

ESTABLISHING AND DEVELOPING  
AN ENDOWMENT PROGRAM FOR  
TEMPLE DE HIRSCH SINAI

A professional project  
presented to the faculty of  
the School of Theology at Claremont  
in partial fulfillment  
for the requirements of the degree  
Doctor of Ministry

Earl Stanton Starr

May 1979  
revised 1983

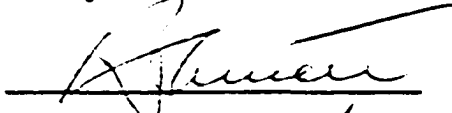
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**DOCTOR OF MINISTRY**

*Faculty Committee*

  
Joseph C. Haugh

April 4 1979  
Date

  
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## ABSTRACT

Churches and synagogues share the common problem of meeting growing budgets in an age of inflation. We must begin to turn our attention to practical and effective means for raising substantial sums of money so that our members will not constantly be harrassed for "more donations" every time they attend religious services.

We want our congregants to develop deep spiritual feelings and the pleading for money interferes with the mood that should be prevalent during prayer, song and study. Nevertheless, the churches and synagogues are in the "real world" and must encounter the same fiscal problems as individuals and businesses. This dissertation deals with a possible solution both short and long term for religious institutions.

The dissertation is divided into two parts. The first part establishes a sound historical and theological basis for the philosophy of philanthropy.

The historical research and writing begins with the Biblical period, and continues with the period of the First and Second Temples, synagogue development, the Middle Ages, and into modern times.

The second part of the dissertation deals with the organization and mechanics of the Endowment Program and Fund. The entire program is developed in detail from the first steps of planning to the secondary stage of operation.

This section includes guidelines, projects, appeals, setting up a separate Endowment Board, training solicitors, involving key members

of the congregation, publicity and promotion, orientation and effective campaigning.

The results of a successful Endowment Program will be the maintenance of a healthy congregation both monetarily and spiritually. Congregations will have a difficult time surviving if they do not have a well planned and successfully executed Endowment Program. The Endowment Fund must become a repository for the accumulation of gifts, large and small, during life and death, held in trust and well managed for the perpetuation of the institution.

## PART I

## HISTORICAL DEVELOPMENT OF JEWISH PHILANTHROPY

When the Jews reached the shores of New Amsterdam in 1654, they were denied landing privileges. The governor, Peter Stuyvesant, declared that they would be a financial burden to the community. His thinking was ironic since historically his argument was based on emotion and lack of knowledge or at best misinformation. The Dutch home government intervened and the Jews became useful citizens in the new land and took care of their people and their own needs.

The story is symbolic because it demonstrates the need to have more historical and theological information tracing the development of Jewish philanthropy.

My thesis is divided into two parts. The first half will deal with the historical development of Jewish philanthropy from biblical times through the modern era. I deal with material that illustrates the general philosophy of charity and the wide scope of giving to many causes. I also have separated material that deals directly with the temple, synagogue, priests, sacrifices, schools, teachers, scholars, cemeteries and burial societies.

The second half of the paper develops an Endowment program for my Temple. I will explain how it developed and take it through every facet of planning, discussion and solicitation. I will justify the needs for the Endowment for the future of the congregation. An evaluation is shown that examines the reaction of members of the Endowment committee and the members of the congregation.

### Biblical Times

There is no exact Hebrew word for charity. The word "Zedakah" is the phrase most often used and the literal translation is "righteousness". We can deduce from this that helping the poor, giving to the needy and aiding institutions are acts of justice and righteousness.

The word is used in the Bible and we will examine some of the verses to prove this theory.

Deuteronomy 24:13: Thou shalt surely restore to him the pledge when the sun goeth down, that he may sleep in his garment, and bless thee; and it shall be righteousness unto thee before the Lord thy God. (JPSV)

The Rabbinic commentary on the phrase "it shall be righteousness" is: "An act of kindness such as this is an act of **צדקה** in its double sense of 'Charity' and righteous living".<sup>(1)</sup>

Isaiah 32:17: And the work of righteousness shall be peace; and the effect of righteousness quietness and confidence forever. (JPSV)

Proverbs 14:34: Righteousness exalteth a nation; but sin is a reproach to any people. (JPSV)

Psalms 106:3: Happy are they that keep justice, that do righteousness at all times. (JPSV)

Daniel 4:24: Wherefore, O king, let my counsel be acceptable unto thee, and break off thy sins by almsgiving, and thine iniquities by showing mercy to the poor; if there may be a lengthening of thy prosperity. (JPSV)

Thus the word Zedakah is applied directly in the Bible but, of course, these verses are only a few pertaining to benevolence.

There is a deep seated spirit pervading the Biblical writings that it is our duty to take care of the less fortunate. This concept

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<sup>1</sup>The Pentateuch and Haftorahs (London: Soncino Press, 1969), p. 852.

is strengthened by the philosophy that we are only stewards of whatever we possess and that God has blessed some so they could share His gifts.

Deuteronomy 15:7: If there be among you a needy man, one of thy bretheren, within any of the gates in the land which the Lord thy God giveth thee, thou shalt not harden thy heart, nor shut thy hand from thy needy brother. (JPSV)

Deuteronomy 15:10-11: Thou shalt surely give him (the poor) and thine heart shall not be grieved when thou givest unto him; because that for this thing the Lord thy God will bless thee in all thy work, and in all that thou puttest thy hand unto. For the poor shall never cease out of the land; therefore I command thee saying: Thou shalt surely open thy hand unto thy poor and needy brother, in thy land. (JPSV)

Proverbs 19:17: He that is gracious unto the poor lendeth unto the Lord. (JPSV)

The Jews in Biblical times were shepherds and farmers. The Bible sets forth specific laws that make it very clear that the land is God's and must be shared.

Leviticus 19:9-10: And when ye reap the harvest of your land, thou shalt not wholly reap the corner of thy field, neither shalt thou gather the gleaning of thy harvest. And thou shalt not glean thy vineyard neither shalt thou gather the fallen fruit of thy vineyard; thou shalt leave them for the poor and for the stranger: I am the Lord your God. (JPSV)

Leviticus 23:22 is a repetition of the Law. The commentary on these verses states: A significant reminder to the Israelite that his thankfulness to God for the wheat-harvest was to be demonstrated by more than an offering on the altar. If he failed to share God's bounty with the poor, his observance of the festival would be unacceptable. (2)

Deuteronomy 24:19-21: When thou reapest thy harvest in thy field, and has forgotten a sheaf in the field, thou shalt not go back to fetch it; it shall be for the stranger, for the fatherless and for the widow; that the Lord thy God may bless thee in all the work of thy hands. When thou beatest thine olive trees, thou shalt not go over the boughs again; it shall be for the stranger, for the fatherless, and for the widow. When thou gatherest the grapes of thy vineyard, thou shalt not glean it after thee; it shall be for the stranger, for the fatherless and for the widow. (JPSV)

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<sup>2</sup>Ibid., p. 522



The following verse in Deuteronomy reminds the people of their history as slaves in Egypt, therefore they are now recipients of God's blessings of freedom that must be shared. In the case that this is not enough incentive the second part of the verse makes it God's law.

Deuteronomy 24:22: And thou shalt remember that thou wast a bondman in the land of Egypt, therefore I command thee to do this thing. (JPSV)

Exodus 23:11: But the seventh year thou shalt let it rest and lie fallow, that the poor of thy people may eat and what they leave the beast of the field shall eat. In like manner thou shalt deal with thy vineyard, and with thy oliveyard. (JPSV)

The institution of the Sabbatical year is fully treated in Leviticus 25 and Deuteronomy 15. It is included here because in one aspect it reinforced the teaching of humanity to the poor and helpless. (Ibn Ezra Luzzatto) (3)

The Rabbinic comment on the wording "may eat" is also germane: In an ordinary year, the poor could gather up the gleanings of the field, and also take from the "corner" which had to be left unreaped (Leviticus 19:9). In the Sabbatical year, there was no harvesting. Proprietor, servants, the poor and the stranger, all had equal rights to the produce (Leviticus 2:5-6) even the beasts of the field are not forgotten. (4)

The Rabbinic commentary on Leviticus 25:32 "the land is Mine" is vital: This verse enunciates the basic principle upon which all these enactments rest. "The earth is the Lord's (Psalm 24:1) and His people hold their lands in fee for Him". (5)

The great calamities which eventually came upon the Hebrew nation were attributed to neglect of this injunction.<sup>(6)</sup> According to the Bible the city of Sodom was destroyed because of uncharitableness.

Ezekiel 16:49-50: Behold this was the iniquity of thy sister Sodom

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<sup>3</sup>Ibid., p. 317

<sup>4</sup>Ibid., p. 317

<sup>5</sup>Ibid., p. 534

<sup>6</sup>Abraham Cronbach, The Bible and Our Social Outlook (Cincinnati: Union of American Hebrew Congregations, 1941), p. 55.

pride, fullness of bread and careless ease...neither did she strengthen the hand of the poor and needy...therefore I removed them when I saw it. (JPSV)

The ancient Hebrews like most of their neighbors saw and described things in absolutes. There were very few gray areas, only the sharpness of black or white, good or evil, reward or punishment. Uncharitableness caused the destruction of Sodom so according to the sources it brings hurt and grief to many.

Proverbs 21:13 warns: Whoso stoppeth his ears at the cry of the poor, he also shall cry himself, but shall not be answered. (JPSV)

Proverbs 17:5: Whoso mocketh the poor, blasphemeth his Maker; and he that is glad at calamity shall not be unpunished. (JPSV)

The Book of Books has many passages that praise the charitable and promise reward.

Psalms 41:2-3: Happy is he that considereth the poor; the Lord will deliver him in the day of evil. The Lord preserve him and keep him alive. (JPSV)

Psalms 112:9: He hath scattered abroad, he hath given to the needy; His righteousness endureth forever; His horn shall be exalted in honour. (JPSV)

The words of Isaiah 58:6-11 are read in the Synagogue on the Day of Atonement (Yom Kippur) continually reminding the people of the importance of charity.

Is not this the fast that I have chosen? Is it not to deal thy bread to the hungry and that thou bring the poor that are cast out to thy house? When thou seest the naked that thou cover him, and that thou hide not thyself from thine own flesh? Then shall thy light break forth as the morning, and thy healing shall spring forth, speedily... Then shalt thou call, and the Lord will answer; Thou shalt cry, and He will say: "Here I am"...Then shall thy light rise in darkness, and thy gloom be as the noonday. And the Lord will guide thee continually and satisfy thy soul in drought...And thou shalt be like a watered garden and like a spring of water, whose waters fail not. (JPSV)

Exacting terms are used in telling the people how much to give

so that there will be no excuse or rationalization in helping the needy. The "Tithe" was ordered, that is the act of giving one-tenth of a person's income to charity.

In the first book of the Bible, the first Jew, Abraham, gives the priest-king, Melchizedek, a tenth of his possessions. Genesis 14:20.

Abraham's grandson Jacob, who would become Israel, speaks at Beth-El: "And this stone, which I have set up for a pillar, shall be God's house; and of all that Thou shalt give me I will surely give the tenth unto Thee." Genesis 28:22. The observant Jew is supposed to follow this prescription literally but Deuteronomy 15:8 also suggests: "Open thy hand and give that which is sufficient for his need." (JPSV)

The Bible thus establishes that one must give, the philosophy of giving, reward for giving, punishment for selfishness, the Theology of Charity and how much one must share.

### The 1st Temple

We now turn our attention to the first Temple and how it was supported, according to the Bible. The Tannach (Bible) refers in several places to permanent treasures that were kept in Solomon's Temple.

I Kings 14:26: And he took away the treasures of the house of the Lord. (JPSV)

II Kings 12:19: And Jehoash King of Judah took all the hallowed things that Jehoshaphat and Jehoram, and Ahaziah, his fathers, kings of Judah, had dedicated, and his own hallowed things, and all the gold that was found in the treasures of the house of the Lord. (JPSV)

II Kings 14:14: And he took all the gold and silver, and all the vessels that were found in the house of the Lord. (JPSV)

II Kings 18:15: And Hezekiah gave him all the silver that was found in the house of the Lord. (JPSV)

II Kings 24:13: And he carried out thence all the treasures of the house of the Lord, and the treasures of the King's house and cut in pieces all the vessels of gold which Solomon, King of Israel, had made in the Temple of the Lord, as the Lord had said. (JPSV)

These verses indicate that there were treasures kept in the Temple and in the dark days when the Holy Land was invaded or in order to influence a threatening power not to attack, the treasures were used and ransacked.

The treasures were usually entrusted to the priests who guarded them because the wealth was supposed to be used for the purposes of the Temple.

I Chronicles 9:26: For the four chief porters were in a set office. These were the Levites. They were also over the chambers and over the treasures in the house of God. (JPSV)

Part of the source of income was from plunder, tribute and war booty, particularly from the time of David.

I Kings 7:51: Thus all the work that King Solomon wrought in the house of the Lord was finished. And Solomon brought in the things which David his father had dedicated, the silver, and the gold, and the vessels and put them in the treasures of the house of the Lord. (JPSV)

There were specific laws that gave instructions to the people so that they would bring their offerings and gifts to the Temple. Chapter 27 of the Book of Leviticus is devoted entirely to this subject. "The book of Leviticus concludes, as it opened, with a chapter of Sanctuary regulations - voluntary contributions to the upkeep of the Sanctuary, such offerings being a true expression of devotion to the house of God."<sup>(7)</sup> Most of the chapter deals with the valuation of shekels and property that a male or female must bring according to their age.

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<sup>7</sup>The Pentateuch and Haftorahs, p. 547

We know that the people were ordered to bring money to the Temple as an offering and a tax.

II Kings 12:5: And Jehoash said to the priest: "All the money of hallowed things that is brought into the house of the Lord, is the current money, the money of the persons for whom each man is rated, all the money that cometh into any man's heart to bring it into the house of the Lord". (JPSV)

The desert tabernacle that preceeded the Temple required taxes as prescribed by Moses, that were in later days prescribed for the Temple.

Exodus 30:13: This they shall give, everyone that passeth among them that are numbered, half a shekel after the shekel of the sanctuary - the shekel is twenty gerahs - half a shekel for an offering to the Lord. (JPSV)

The Rabbinic commentary on the phrase "offering to the Lord": Hebrew Terumah, a contribution; the same phrase is used in Numbers 31:52. (8)

This law is applied later in II Chronicles 24:6: And the king called for Jehoiada the chief, and said unto him: "Why has thou not required of the Levites to bring in out of Judah and out of Jerusalem the tax of Moses, the servant of the Lord and of the congregation of Israel, for the tent of the testimony?". (JPSV)

II Chronicles 24:9-10: And they made a proclamation through Judah and Jerusalem, to bring in for the Lord the tax that Moses, the servant of God laid upon Israel in the wilderness and all the princes and all people rejoiced and brought in and cast into the chest until they had made an end. (JPSV)

We see that the tax was used for repairs of the Temple in II Chronicles 24:12: And the King and Jehoiada gave it to such as did the work of the house of the Lord, and they hired masons and carpenters to restore the house of the Lord, and also such as wrought iron and brass to repair the house of the Lord. (JPSV)

The commentaries tell us that the shekels mentioned in Exodus chapter 30 were used "for the bases of the pillars of the sanctuary and also for the hooks to keep the boards together." (9)

II Kings 12:7-16 reflects the same emphasis that the money was to be used for repairs to the Temple. Verse 6 introduces it with definite

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<sup>8</sup>Ibid., p. 352

<sup>9</sup>Ibid., p. 352-353

direction:

Let the priest take it to them; every man from him that bestoweth it upon him; and they shall repair the breaches of the house, whatsoever any breach shall be found. (JPSV)

II Kings 22:4-7 was written near the end of the first Temple, and again supports the fact that the money should be used for Temple upkeep:

Go up to Hilkiyah the high priest, that he may sum the money which is brought into the house of the Lord, which the keepers of the door have gathered of the people; and let them deliver it into the hand of the workmen that have the oversight of the house of the Lord; and let them give it to the workmen that are in the house of the Lord to repair the breaches of the house; unto the carpenters and to the builders, and to the masons; and for buying timber and hewn stone to repair the house. Howbeit there was no reckoning made with them of the money that was delivered into their hand; for they dealt faithfully. (JPSV)

It was incumbent that the priests of the Temple be supported in order that they would carry out their sacred duties.

II Chronicles 31:4: Moreover he commanded the people that dwelt in Jerusalem to give the portion of the priests and the Levites, that they might give themselves to the Law of the Lord. (JPSV)

Verses 5 and 6 command a tithe of corn, wine, oil, honey, products of the field, oxen and sheep. Verses 11 and 12 reveal that the priests brought much of the goods to the Temple and placed them in special chambers.

Numbers 19:21: And unto the children of Levi, behold, I have given all the tithe in Israel for an inheritance, in return for their service which they serve, even the service of the tent of meeting. (JPSV)

Verse 26 places a tithe on the tithe that the Levites received, "To be set apart of it a gift for the Lord." (JPSV)

The chief administrator of the Temple was the King and he too was expected to contribute to the treasury of the Lord's house:

II Chronicles 31:3: He appointed also the King's portion of his

substance for the burnt-offerings, to wit, for the morning and evening burnt-offerings and the burnt-offerings for the Sabbaths, and for the new moons, and for the appointed seasons, as it is written in the Law of the Lord. (JPSV)

Ezekiel 35:17 has the same message and practically the exact wording. The importance of these selections is that everyone was expected to contribute to the building, maintenance, upkeep, repair and service of the Temple.

### The 2nd Temple and the Development of Synagogues

The first Temple was destroyed in 586 B.C.E. by the Babylonian army of Nebuchadnezzar. The Babylonian policy of exiling leaders and influential families was carried out and the Jews were taken to the land of their captors. Historians agree on these facts but there is much discussion concerning the origins and beginnings of the Synagogue.

Josephus wrote that there were synagogues in the time of Moses<sup>(10)</sup> and in Acts 15:21 there seems to be agreement:

For from early generations Moses has had in every city those who preach him, for he is read every sabbath in the synagogues. (RSV)

"Some scholars date its origins to the period of the first Temple built by Solomon about 950 B.C.E., others claimed it to have been an invention of the Hellenistic Diaspora."<sup>(11)</sup>

Whenever it was founded we can be sure that by the 1st century C.E., the Synagogue was well established and had become the most important

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<sup>10</sup> Josephus, The Works of Josephus (Philadelphia: McKay, N.D.), p. 912.

<sup>11</sup> Brian de Breffny, The Synagogue (New York: Nelson, 1946), p. 151.

institution in Judaism and also influenced Christianity and Islam.<sup>(12)</sup>

The Synagogue grew in response to the people and their needs. The three fold function of prayer, study and social activities took place in every town and city. The study of Torah began to blend into the worship service of the Synagogue and this became the strength of the Synagogue. Thus the "Gathering House", the "House of Assembly", in Hebrew the "Bet-Ha-Keneseth" became paramount in Jewish life and survival.

Jesus often worshipped in the synagogue at Capernaum and a discussion with the Jewish elders reveals an interesting fact:

Luke 7:2-5: Now a centurion had a slave who was dear to him, who was sick and at the point of death. When he heard of Jesus he sent to him elders of the Jews, asking him to come and heal his slave. And when they came to Jesus, they besought him earnestly, saying, "He is worthy to have you do this for him, for he loves our nation, and he built us our synagogue." (RSV)

The importance of the above passage is that funds to build synagogues came from many sources, in this case a Roman leader.

The second Temple was rebuilt only 70 years after the destruction of Solomon's Temple. The Jews living in the Holy Land and those outside who could make the pilgrimage came to the "Bet-Ha-Mekdash", literally the "House of Sanctuary", to offer their oblations and sacrifices.

During the time that the Temple was still in existence until 70 C.E. the Synagogue and the Temple had a harmonious existence. The Talmud in Megilah 3:1 gives the number of synagogues at the time of the destruction of the Temple as 480 and in Ketubah 1052 they are counted as 394. They were numerous and usually small buildings. We know from the Old and New Testament that synagogues were found throughout the Diaspora and in the Holy Land.



Some of the methods that were used to support the second Temple were in vogue when the first Temple was standing in its splendor. Money, jewels, weapons and vessels were donated from many sources.

The Holy Land was often occupied by foreign forces and the rulers contributed to the treasury of the major sanctuary. Darius King of Persia speaks:

Ezra 6:8-14: Moreover I make a decree regarding what you shall do for these elders of the Jews for the rebuilding of this house of God, the cost is to be paid to these men in full and without delay from the royal revenue, the tribute of the province from Beyond the River and whatever is needed - young bulls, rams, or sheep for burnt-offerings to the God of heaven, wheat, salt, wine or oil as the priests in Jerusalem required - let that be given to them day by day without fail, that they may offer pleasing sacrifices to the God of heaven and pray for the lives of the king and his sons. Also I make a decree that if anyone alters this edict, a beam shall be pulled out of his house, and he shall be impaled upon it and his house shall be made a dunghill. May the God who has caused his name to dwell there overthrow any king or people that shall put forth a hand to alter this or to destroy this house of God which is in Jerusalem. I Darius make a decree; let it be done with all diligence. ....They finished their building by command of the God of Israel and by decree of Cyrus and Darius and Artaxerxes King of Persia. (RSV)

Another important factor is clear in this passage - the theological concept that it was the House of God and that God had the power to destroy anyone who tried to disrupt and disturb the Temple.

Josephus further documents the theory of foreign rulers contributing to the Temple and the theological concept that the God of the Jews was respected and feared.

When this epistle was sent to the King, he commanded that an epistle should be drawn up for Eleazar, the Jewish high priest, concerning these matters; he also sent fifty talents of gold for the making of large basins, and vials and cups and an immense quantity of precious stones. He also gave order to those who had the custody of the chest that contained those stones, to give the artificers leave to choose out what sorts of them they pleased. He withal appointed, that 100 talents in money should be sent to the Temple for sacrifices and for other uses. However, I thought it not improper to give an account of those very valuable and artifiically contrived vessels which the

king sent to God, that all may see how great a regard the king had for God. (12)

In Antiquities and the Apocrypha we learn of other kings - Ptolemy, Philadelphus, Seleucus IV, Antiochus III, Demetrius, Sosius, Marcus Agrippa, Augustus Ceasar and his wife Julia and others who gave generously to the Temple system. One selection will suffice to support this testimony.

Ptolemais and the land pertaining to it I have presented to the sanctuary in Jerusalem for the expenses incident to the sanctuary. And I will give fifteen thousand silver shekels every year, from the King's revenues, from such places as are convenient. And the additional grant, which the administration has not paid over as it formerly did, they shall henceforth pay in full toward the service of the Temple. In addition, the five thousand shekels which they used to take out of the dues of the Temple, from the revenue every year, is also cancelled, for it rightfully belongs to the priests who conduct the worship. And whoever takes refuge in the Temple at Jerusalem and in any of its precincts who owes money to the king or any other obligation shall be released from it, with all his property in my realm. The cost of rebuilding and renovating the fabric of the sanctuary shall be provided out of the king's revenue. The cost of rebuilding the walls of Jerusalem and of fortifying it all around and of building the walls of Judea, shall also be provided out of the king's revenue. (13)

Let us not be mislead into thinking that Jews were not doing their utmost for the Temple. Wealthy and powerful individuals gave large and beautiful gifts. The Talmud, Apocrypha and Josephus give many examples.

Ben Katin made twelve stop-cocks for the laver which before had but two; and he also made a device for the laver that its water should not be rendered unfit by remaining overnight. King Monobaz made of gold all the handles for the vessels used on the Day of Atonement. His mother Helena set a golden candlestick over the door of the Sanctuary. She also made a golden tablet on which was written the

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<sup>12</sup>Josephus, p. 351-352

<sup>13</sup>Edgar J. Goodspeed, The Apocrypha (New York: Random House, 1959), P. 416.

paragraph of the Suspected Adulteress. (14)

The Hebrew word Hekdesh usually refers to consecrated property that was used for the needs of the Temple and was specially dedicated. During later times it meant property designated for charitable purposes. The Temple in Jerusalem sold the property and the proceeds were placed in the treasury for Temple use. (15)

There were other sources for the Temple contributed by the poor and the rich.

The high priest pointed out that some deposits belonged to widows and orphans and one belonged to Hyrcanus, son of Tobias, a man of very high position - so falsely had the impious Simon spoken; that it all amounted to four hundred talents of silver and two hundred of gold, and that it was absolutely impossible that those who were relying on the sacredness of the place and on the sanctity and inviolability of the temple, which was respected all over the world, should be wronged. (16)

The law of Moses was still in force and this tax was the main subsistence for the Temple.

Exodus 30:13-14: Each who is numbered in the census shall give this: half a shekel according to the shekel of the sanctuary (the shekel is twenty gerahs) half a shekel as an offering to the Lord. Everyone who is numbered in the census, from 20 years old and upward, shall give the Lord's offering. (RSV)

The Rabbinic commentary on this passage stresses that the tax was the same for all because all are equal in the eyes of God and in the service of the Sanctuary. Also it was stressed:

That the half shekel that was to be paid, taught that an individual's contribution to the community was but a fragment. For any complete work to be achieved on behalf of the sanctuary, the efforts of all,

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<sup>14</sup>The Mishnah (London: Oxford University Press, 1933), p. 165-166.

<sup>15</sup>Ibid., p. 153-154, 550-552

<sup>16</sup>Goodspeed, p. 451

high and low, rich and poor alike are required. The Jews outside Palestine were throughout the Ancient world, as zealous in their contribution of this Temple tax as the inhabitants of Judea. (17)

An elaborate system of contributions was carried out until the destruction of the second Temple. There were specific times for the bringing of the half shekels and tables were set up in the country and the Temple for collections. The money was put into the Temple treasury and the rest placed in a box for surplus funds. The functions of the Temple were supported by these funds even so far as the maintenance of the water system and the repairs of the towers of Jerusalem.

The causeway for the (Red) Heifer and the causeway for the scape-goat and the thread between its horns, the (upkeep of the) water-channel, the city wall and the towers thereof and all the city's needs were provided from the residue of the Shekel-chamber. (18)

The injunction in Leviticus chapter 27 was still followed and the Arakhin (vows of valuations) were used for Temple repairs.

The Rabbinic commentary says: The Book of Leviticus concludes as it opened, with a chapter of Sanctuary regulations - voluntary contributions to the upkeep of the Sanctuary, such offerings being a true expression of devotion to the House of God. (19)

During the time of the second Temple the synagogues continued to gain importance. Some of the same services and prayers were used in the Temple as well as the synagogue. Torah readings, and hours of prayer were set according to the times of the sacrifices and when people prayed, no matter where they might be, they always faced the direction of the Temple and Jerusalem.

The priestly blessings, the blowing of the shofar (the ram's

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<sup>17</sup>The Pentateuch and Haftorahs, p. 353.

<sup>18</sup>The Mishnah, p. 155

<sup>19</sup>The Pentateuch and Haftorahs, p. 547

horn), waving of the Lulav (palm branch) were taken from the Temple service and became part of the Synagogue's service. Nevertheless, the Temple was still considered the holiest place of God and was the only place designated for animal sacrifices to show loyalty to Yahweh.

The religion was not destroyed when the Temple was reduced to rubble by the Roman legions in 70 C.E. because the Synagogue was in its own right the "little House of God" and the comfortable abode - "Bet-Ha-Am" of the Jews. The Synagogue has influenced not only Judaism throughout the ages, but organized religion as a whole.

Indeed the genius of Israel, which produced the prophets, the true exponents of religion for humanity, created in the institution of the Synagogue what no religion previously had possessed, a house of real communion of the soul with God, "a house of prayer for all peoples". (20)

Benevolence was one of the great pillars of the Synagogue, according to Simon the Just, in the third century before Christ and "Organized charity was one of the principal institutions of the synagogues at an early age." (21)

There are 7 branches of charity specialized in the older Jewish sources; 1) to feed the hungry, and give drink to the thirsty; 2) to clothe the naked; 3) to visit the sick; 4) to bury the dead and comfort the mourners; 5) to ransom the captives; 6) to educate the fatherless and shelter the homeless; 7) to provide poor maidens with doweries. The pious ones in each city, the class called Hasidim (Essenes) divided themselves into special groups for the performance of these different practices which they claimed to have come down from Abraham and Melchizedek and which they ascribed even to God as the pattern of such acts of kindness to man. (22)

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<sup>20</sup> Kaufman Kohler, The Origins of the Synagogue and the Church (New York: Macmillan, 1929), p. 6

<sup>21</sup> Boris Bogen, Jewish Philanthropy (New York: Macmillan, 1917), p. 16

<sup>22</sup> Ibid., p. 16-17

This group of pious men and the rabbis established in every town, in connection with the synagogue, a treasury for the poor. The poor were able to receive help in secret rooms called "Chambers of Reticient." There also existed as part of the general system of relief a charity box in each community. The poor received enough money for food and clothing for the week. There was also a soup kitchen and a special fund for transients. No more than three men were connected with deciding on the merit of the applicants.

Two men of the highest respectability were sent for to collect the funds, and were empowered to tax the individuals in the community and to seize their property until the demanded sum was forthcoming. These collections were made weekly by the two officers, who were not allowed to separate while collecting or holding the money, in order to avoid all suspicion. (23)

Historically we have learned that the synagogue replaced the Temple, received the attention of the people as their gathering place, study hall and meeting house of prayer. The Jews built and maintained the Bet-Ha-Keneseth (Synagogue) and the Synagogue in early times dispensed and directed the charity of the community based on the theology of Mosaic law and the preachings of the Prophets and Psalmists.

The principle that the strong must bear with the weak and he who has much must share with him who is in want was ingrained in the soul of the Jew from the very beginning, and in making provisions for the needy he changed the moral aspect of the world. This was already recognized by the Emperor Julian so as to induce him to establish similar institutions in his Empire. Whatever the Church did in this regard in her larger field was simply adopted from the Synagogue. (24)

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<sup>23</sup>Ibid., p. 21

<sup>24</sup>Kohler, p. 151

### The Middle Ages

The body of Jewish law, customs and traditions concerning benevolence continued through the difficult period of the Middle Ages.

The Synagogue became even more important particularly as a communal center. The interesting custom of reciting the Kiddush (the sanctification of the wine) in the synagogue developed because many visitors and poor strangers "ate, drank and slept in the Synagogue."<sup>(25)</sup>

We learn from the Talmud (Tosaf. Meg. 28a) that this probably refers not to the synagogue proper but to buildings set up by the synagogue. Annexes were provided for the purpose of hospices and chamber of water installations for lodging needy strangers.

The historian Abrahams writes: It is therefore not far from the truth, a possible connection of the ancient "pandok" with the communal inn of the middle ages for the lodging and feeding of poor and sick travelers which became a special necessity after the Crusades. (26)

Human goodness and concern for others often appears at the darkest times - this was the case in Medieval Jewish life. Forced to live in the confining areas of the Ghetto, burdened by oppressive laws and excessive taxes, the Jewish community developed greater solidarity.

"Gemilus Chasidim" - acts of loving kindness - grew even greater and a more universal attitude toward the unfortunate, including the poor gentiles became a way of life. This Talmudic custom had new meaning in Medieval days.

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<sup>25</sup>The Babylonian Talmud(London: Soncino Press, 1938), p. 536 Seder Mo'ed Vol II.

<sup>26</sup>Israel Abrahams, Jewish Life in the Middle Ages(Philadelphia: Jewish Publication Society, 1911), p. 314.

Where Jews and non-Jews lived together in the same city, it was decreed by Pharisean authorities that for the sake of peace and in order to further relations of good will, the non-Jewish poor should be supported together with those of the Jews, the sick non-Jews be visited together with those of the Jews, and the dead non-Jews be buried and honored like those of the Jews, and likewise comfort be offered to the sorrowing of either non-Jews or Jews; also that the collectors of alms on both sides should cooperate. (27)

This teaching aided the Jews in helping fulfill greater moral and religious acts.

Most of the Christian communities had specific laws and taxes pertaining to their Jews. The Jewish authorities in order to meet demands and pressures produced ordinances for individuals and the community.

Their combined effect, justified to a large extent the Jews claim to their self-chosen designation as "merciful descendants of merciful sires", which was based on their tracing the origins of their extensive system of social welfare to the beginnings of national history in the days of Abraham, the Patriarch. (28)

Two great Rabbinical authorities, Moses Maimonides and Joseph Karo, said that every community followed Talmudic law and had a charity chest (Kuppah), this was universal. Other communities had kitchens (Tamhui) for food distribution and "Kesut" for the giving of clothes.

The Kuppah was the main source in dealing with poverty and the methods of distribution varied from town to town. We learn of weekly distribution, increases during the holidays, special passover gifts of unleavened bread (Matzos) and wine.

We discover difficulties arising with different interpretations of the Talmudic law concerning people begging from door to door.

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<sup>27</sup>Kohler, p. 152.

<sup>28</sup>Salo Baron, The Jewish Community(Philadelphia: Jewish Publication Society, 1948), II, 320



Maimonides and Jacob ben Asher interpreted the ancient rule with sufficient rigidity to insist that individual Jews give only a minimum to beggars, Asherben Yehiel and others believed that this limitation applied only to public charities. (29)

Eventually itinerant poor were given housing and tickets for food. Every householder was ordered to deposit in a chest a number of billets (corrupted into the term Pletten) according to wealth. This became fairly standardized in Central European communities. As time went on distinctions became more pronounced between visiting scholars, students and ordinary mendicants.

Some rabbis, in fact, followed Isaac ben Baruch and interpreted the preferential treatment given local poor in the Talmud as referring exclusively to the duty of meeting local charity needs before extending financial aid to another community. (30)

All of these discussions, decisions and measures point out the severe refugee problem during Medieval times. One of the most interesting and enlightened procedures was carried out in Poland before the Cossack massacres in 1648. Poland had a large Jewish population, nevertheless they gave free lodging to any traveler for at least three days and transportation to the nearest town. Different methods of relief came into use as the number of poor travelers increased because of expulsions and persecution.

Food distribution was the first order of business. The wealthy were told to follow the example of Abraham and of Hanna bar Hanilai who extended the hospitality of their homes to the poor.

Once when 'Ulla and Rabbi Hisda were walking along the road, they came to the door of the house of Rabbi Hana b. Hanilai. Rabbi Hisda

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<sup>29</sup> Isaac Leiser, Occident, XVIII(1860), 243

<sup>30</sup> Baron, II, 323.

broke down and sighed. Said 'Ulla to him: "Why are you sighing,"... He replied: "How shall I refrain from sighing on seeing the house in which there used to be sixty cooks by day and sixty cooks by night, who cooked for everyone who was in need. Nor did he (R. Hanna) ever take his hand away from his purse, thinking that perhaps a respectable poor man might come, and while he was getting his purse he would be put to shame. Moreover it had four doors, opening on different sides, and whoever went in hungry went out full. They used to throw wheat and barley outside in years of scarcity, so that anyone who was ashamed to take by day used to come and take by night. Now it has fallen in ruins and shall I not sigh?" (31)

Then arose as a general rule in each town a Traveler's Inn, called by the Christian people of Spain and France the Jew's Inn for the lodging and feeding of the poor and the sick by way of revival of the ancient hospice. (32)

The word Hekdesh (earlier referred to as consecrated property) took on new meaning. Hekdesh as early as the 11th century in Cologne meant hospital. By the 17th century there was a Hekdesh in every Jewish community, that was an inn for the poor and the stranger and a hospital for the sick and aged.

During this time it became one of the greatest of virtues to take care of the orphans. Children were adopted and taught a trade or if they had exceptional ability they were trained for scholarly pursuits.

Relying on Biblical teachings, special care was given to the orphans and the widows. The Jews were so concerned about the orphans that most communities elected not to tax them, even if they had inherited wealth. It was debated in many places and altered to the discretion of the elders, whether orphans must support their father's needy relations and following a much debated talmudic rule, contribute for the redemption of captives.

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<sup>31</sup>The Babylonian Talmud, p. 363-364, Seder Zera'im

<sup>32</sup>Bogen, p. 24

Care of widows and orphans had been deeply ingrained in the Jewish heart and mind since Biblical times:

Deuteronomy 24:17: Thou shalt not pervert the justice due to the stranger or to the fatherless, nor take the widows raiment to pledge. (JPSV)

The Prophets expounded this noble teaching, Isaiah 1:17: Learn to do well, seek justice, relieve the oppressed, judge the fatherless, plead for the widow. (JPSV)

Ezekiel 22:7: In thee have they made light of father and mother; in the midst of thee have they dealt by oppression with the stranger; in thee have they wronged the fatherless and the widow. (JPSV)

Job adduced it as one of his merits that he had helped the fatherless, Job 29:12: Because I delivered the poor that cried, the fatherless also, that had none to help him. (JPSV)

According to the Bible, God is the protector of the orphans, Psalms 68:6: A father of the fatherless, and a judge of the widows is God in his holy habitations. (JPSV)

Psalms 10:14: ...Unto Thee the helpless committeth himself. Thou hast been the helper of the fatherless. (JPSV)

Maimonides in his Yad, De'ot 6:10, in a long passage on the care of widows and orphans summarizes the Biblical and Talmudic teachings. The introduction will suffice to prove the concern:

A man ought to be especially heedful of his behaviour toward widows and orphans, for their souls are exceedingly depressed and their spirits low. Even if they are wealthy, even if they are the widow and orphan of a king, we are specifically enjoined concerning them, as it is said, "Ye shall not afflict any widow or orphan" (Exodus 22:21).

There was no Jewish orphanage until the Spanish-Portuguese community of Amsterdam established one in 1648.<sup>(33)</sup> The Talmud in Ketubah 50a asks: "Is it possible to do righteousness at all times?" The answer follows: "This refers to a man who brings up an orphan boy or orphan girl in his house and enables them to marry."

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<sup>33</sup>Baron, II, 332

One of the most pressing problems for the Jews in the Middle Ages was the ransoming of captives. The fulfillment of this mitzvah was regarded by the rabbis of the Talmud as of paramount importance.

Ifra Hormizd the mother of King Shapur sent a chest of gold coins to R. Joseph, with the request that it should be used for carrying out some really important religious precept. R. Joseph was trying hard to think what such a precept could be, when Abaye said to him: Since R. Samuel b. Judah has laid down that money for charity is not to be levied from orphans even for the redemption of captives, we may conclude (8b) that the redemption of captives is a religious duty of great importance. Raba asked Rabbah b. Mari: Whence is derived the maxim of the Rabbis that the redemption of captives is a religious duty of great importance? - He replied: From the verse, And it shall come to pass when they say unto thee, Whither shall we go forth, then thou shalt tell them, Thus saith the Lord, Such as are for death, to death, and such as are for the sword, to the sword, and such as are for famine, to the famine, and such as are for captivity, to captivity: and (commenting on this) R. Johanan said: Each punishment mentioned in this verse is more severe than the one before. The sword is worse than death; this I can demonstrate either from Scripture, or if you prefer, from observation. The proof from observation is that the sword deforms but death does not deform; the proof from Scripture is in the verse, Precious in the eyes of the Lord is the death of his saints. Famine again is harder than the sword; this again can be demonstrated either by observation, the proof being that the one causes (prolonged) suffering but the other not, or if you prefer, from the Scripture, from the verse, they that be slain with the sword are better than they that be slain with hunger. Captivity is harder than all, because it includes the sufferings of all. (34)

The Talmud further tells us that God creates miracles so the captives can be saved:

Once Rav Phinehas bar Jair was on his way to redeem captives and came to the river Ginnai. "O Ginnai" said he, "divide thy waters for me that I may pass through thee." It replied, "Thou are about to do the will of thy Maker, I too, am doing the will of my maker." (35)

Maimonides in Yad, Mattenat Aniyyim 8:10 further stresses its importance:

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<sup>34</sup>The Babylonian Talmud, p. 36, Seder Nezikin. Vol. II.

<sup>35</sup>Ibid., p. 28, Seder Kodashim. Vol. II.

The redemption of captives has precedence over the feeding and clothing of the poor, and there is no commandment as great as that of redeeming captives, for the captive is among the hungry, thirsty and naked, and lives in constant danger. He who closes his eye to an opportunity of redemption violates several negative and positive commandments.

There were specific rules for the ransoming of captives according to Jewish Law:

1) Women captives should usually be given preference before male captives. 2) A person captured with his father and his teacher may ransom himself first. He is then bound to ransom his teacher and only thereafter his father. A scholar should be given preference even to a king of Israel. 3) The court has the power to compel a husband to ransom his wife. 4) Money set aside for charity purposes or for the building of a synagogue may be used to ransom captives. 5) A person who delays the fulfillment of this duty and causes an undue prolongation of his fellow Jew's imprisonment is regarded as if he had spilled his blood. (36)

All of these ideas were more than enlightened expressions. Unfortunately they were put to the test many times. The ransoming of captives in large numbers began under Roman domination, continued during the 9th to 12th centuries in Muslim countries and finally in Christian lands where Jews resided. Wars, pirate raids, severe persecutions all contributed to many Jews being taken captive.

It is ironic how Hollywood has romantically portrayed the pirates and the Cossacks. They flash across the screen swashbuckling, fearless, handsome and brave. Historically, they were cut-throats, murderers, thieves and scoundrels.

The pirates raided many Mediterranean towns and took Jews into captivity and the Polish Jews were used for ransom by the Cossacks. Community funds were overburdened and it was necessary for all Jews,

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<sup>36</sup> Editorial Staff, "Captives, Ransoming of", Encyclopaedia Judaica (Jerusalem: Keter, 1974), V, 154.

even in distant places, to aid in the redemption of their co-religionists.

There are far too many cases of these horrors that led to honorable acts, but I will give a few examples.

In 1487 Malaga was captured and about a thousand Jews were taken prisoner. The Chief Rabbi of Spain collected a huge ransom of 20,000 doblas in addition to the entire property of Malaga.<sup>(37)</sup>

The Polish-Russian wars and the Swedish-Moscovite wars forced the Lithuanian and Polish Jewish communities to have public monthly collections in the synagogues and weekly door to door solicitation.

The United action of the Jewish communities led a Frenchman traveling through the Balkans and Asia to note with amazement, that although Turkish law allowed both Muslims and Christians to own Jewish slaves, "The Jews were so united among themselves and so full of finesse that they never permitted one of their people to remain in servitude."<sup>(38)</sup>

Many different and varied activities came under the heading of Jewish Philanthropy during the Middle Ages. We see the real beginning of a least a semblance of organization and fund raising methods that would reach a zenith in Modern times. An excellent example of this is the relief that was collected and sent to the impoverished communities of Palestine.

The traditional prayerbook expresses the Messianic dream that

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<sup>37</sup>Baron, II, 334.

<sup>38</sup>Ibid., II, 337.

the Holy Land would be returned to the Jews. Pious Jews wanted to live and die there. This hope gave the Ghetto communities a feeling their difficulties were only temporary. The "Love of Zion" was a unifying force. The Jews who were able to settle in Palestine had limited economic opportunity under Arabic and Turkish rule and domination and they had to look for support to their co-religionists living in the Diaspora.

Special chests for Palestine relief, increasingly known under the name halukkah (distribution) and administered by influential overseers, were established in many communities, and charitable bequests by individual philanthropists became increasingly common all over the Jewish world. (39)

There developed a continuing contact between the Jews of Palestine and those of the Diaspora through the system of messengers. These special individuals sometimes encountered difficulty and at times created problems in Jewish communities, nevertheless they helped to begin an organization of interterritorial unity of Jewish communities and keep alive the spirit of charity and the dream of the rebirth of Israel that would lead to miracles in Modern Times.

### Modern Times

The 19th century brought about major changes in Jewish life and necessitated the creation of new formulas to solve immense problems. Jewish charity grew to unheard of sums. The form may have been different but the giving was consistent with its ancient spirit. In this section I will deal mainly with the 20th century and American Jewry's reaction to the challenges.

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<sup>39</sup> Ibid., II, 340.

Many Jews do not consider themselves to be very religious, but they manage to be very Jewish. They are Jews and Americans but they have also created a third world. There are domains and subdomains, worlds within worlds but the most important, powerful and best organized is the world of philanthropy.

It derives its strength and influence from the curious fact that most middle-class American Jews, regardless of their other affiliations, feel a need to identify with the Jewish community by giving away money. In doing so, these people, though they may never set foot in a synagogue, are performing a mitzvah (fulfilling a commandment - doing a good deed). Zedakeh, the spirit of charity, is as much a part of the law as Kashruth (law of food). God has commanded his people to help the poor and unfortunate. (40)

The philosophy and theology of Judaism blend into a clear pattern for the individual and the community. Judaism stresses this world concept - that people are shutafs (co-workers) with God, His partners in the ongoing process of creation. It is our duty to try to make heaven here on earth for all people. We must help the poor and needy, alleviate the suffering, build a better world here and now, not in the hereafter. Charity is given to people, not because they deserve it, but because they have the right to it.

We have seen how the principle of charity grew and developed in the Shtetl (Jewish community) and the Ghetto. Organizations, societies and associations were formed so that no person would be put to shame or bring shame on the community. From the beginning of American Jewish history the same philosophy was followed but the methods changed.

There were three main waves of Jews that came to these blessed

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<sup>40</sup>James Yaffe, The American Jews (New York: Random House, 1968), p. 165.



shores. The Sephardim (Spanish-Portuguese), German and finally Eastern European.

At first, social work was often done on a person to person basis. Each community took care of its own, but by the beginning of the 20th century, with so many immigrants from Eastern Europe arriving, the old ways were not sufficient. They were wasteful, haphazard and inefficient. "From a simple beginning it developed into the rudiments of a scientific and constructive system of charity administration, which replaced the haphazard alms-giving which had previously been the general rule."<sup>(41)</sup>

(Before World War I) societies were founded under synagogue auspices. In fact some synagogues continued for some time to provide out of their own funds, direct assistance to the needy. Gradually, however, these services and organizations, through which they were implemented became independent of synagogues. <sup>(42)</sup>

The first great central bureau was established in Boston in 1895 and then most cities began to copy the model.

In the United States an attempt to bring the special relief societies into a union was attempted as early as 1885, when a conference was held in the city of St. Louis, but came to naught. In 1899 a similar movement was organized and the first conference of this society, known as the National Conference of Jewish Charities was held in Chicago in June 1900. <sup>(43)</sup>

National organizations came into prominence with the problems created by World War I. The Joint Distribution Committee was formed to

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<sup>41</sup>Cecil Roth, The Jewish Contribution to Civilization(Cincinnati: Union of American Hebrew Congregations, 1940), p. 333

<sup>42</sup>Charles S. Levy, "Jewish Communal Services: Health, Welfare, Recreational and Social", in Oscar I. Janowsky (ed.) The American Jew (Philadelphia: Jewish Publication Society, 1964), p. 254

<sup>43</sup>Lee K. Frankel, "Charity and Charitable Institutions", Jewish Encyclopedia(New York: Funk and Wagnalls Company, 1902), III, p. 676

help resettle Jews uprooted by the war. Before it could disband pogroms (riots against Jews) broke out in 1925.

The history of the Joint Distribution Committee is a running commentary on Jewish life here and in Europe. It illustrates the growth of the American Jewish community in size and wealth. We also are made aware of the differences that made it difficult to centralize fund raising.

The early Sephardic Jews and the German Jews who came to this country at a time of expanding economy and rich opportunities were well established by the time the Eastern Europeans began to arrive in large numbers. The three groups here had special feelings for each other because of the Judaism yet there was also a separation that was caused by their cultural difference, financial and social positions.

The German Jews were shaped by Reform Judaism, which emphasized adaptation to modern life rather than traditional orthodoxy - full participation in American society rather than separateness.

The newcomers (Eastern European) came to America at a time of industrialization and many of them worked in sweatshops and lived crowded together in poorer districts in large cities. They formed their own societies, continued to speak Yiddish and had their own newspapers and theaters.

Even this group was divided. The very orthodox wanted to transfer their shtetl existence to the new country, while others believed that it was the time for new freedom. Since most of them were workers they helped to build and strengthen the labor movement and many of them were secularists.

Yet a powerful sense of obligation led those whose status was quite comfortable to respond to the needs of the less fortunate. The traditional injunction that each individual must contribute to Zedakah, that charity which literally means "Justice" remained strong. (44)

Most Jewish homes had a pushke or collection box, a constant reminder of K'lal Yisrael the community of the Jewish people.

Great reform Rabbis - Isaac Mayer Wise, Kaufman Kohler, Emil G. Hersch, Joseph Krauspopf - stressed the moral and ethical imperatives of Judaism and told their congregations that it was their duty to help all Jews and all noble and needy causes.

The laymen were greatly influenced by these preachings and by world conditions and in 1906 a small wealthy group of German Jews established the American Jewish Committee.

The purpose of this committee was to protect the rights and ameliorate the condition of their co-religionists throughout the world. It thus fell within the traditions of both Jewish communal organization and American overseas philanthropy. But this was a loosely structured organization, which worked informally through the efforts of a handful of men. (45)

Events in Jewish history have a way of bringing the diverse elements together and helping to find solutions for crisis situations. The elements of the rise of anti-semitism, especially in Europe, and the outbreak of World War I were the catalyst that would help to unify The American Jews in the task of aiding their beleaguered brothers and sisters. The instrument in 1914 was the Joint Distribution Committee. They have since expended well over a billion dollars to 5,000,000 Jews in seventy countries.

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<sup>44</sup>Oscar Handlin, A Continuing Task(New York: Random House, 1964), p. 12.

<sup>45</sup>Ibid., p. 17.

The merging of forces did not go unnoticed. It once again reinforced the feeling that Jews must help each other and that the most efficient and effective methods had to be found. Unfortunately it took Hitler's gas chambers and his final solution to the Jewish problem to bring about proper cooperation and solidarity in the American Jewish community.

In 1934 a coordinating committee was formed in greater New York to take care of refugees from Germany and in 1939 it was expanded into the National Refugee Service. Also in 1939, the United Jewish Appeal (UJA) was founded. Originally it was a temporary organization created by contractual arrangements between the Joint Distribution Committee and another Eastern European group, the United Palestine Appeal. Today it has grown up, it has been supporting its parents for years. (46)

The Jews were shocked back into their age old teaching of peoplehood.

The United Nations in 1948 declared Israel to be an independent state. There have been thirty-one years of incredible growth, progress and achievement. There have also been four major wars, monetary crises and mass absorption of Jews from all over the world.

Hitler was a negative force in bringing about American Jewish cooperation. Israel was the positive rallying force that practically every Jew felt he could support. The United Jewish Appeal, working through local federations, held annual fund raising campaigns.

About \$6.9 billion was raised by the central Jewish community organization of the United States in their annual campaigns in the 38 year period, 1939 through 1976 with about \$3.7 billion of the total raised in the ten year period 1967-76. (47)

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<sup>46</sup>Yaffe, p. 167

<sup>47</sup>The American Jewish Year Book(Philadelphia: Jewish Publication Society, 1978), LXXVIII, 174.

It is quite apparent that the federations and UJA have been a collective voice for the American Jewish community.

At a conference in New Orleans, following the Arab-Israel conflict in 1973, these words were spoken:

For if we Jews are now an endangered species, as has been suggested, we are not polar bears nor bald eagles, said one speaker. We are Jews, with both millennial experience in dealing with a hostile world and with immense new capabilities for forging our own destiny rather than being, as we were for centuries, puppets of history, manipulated by others...Does anyone think at this heart-stopping moment that there is a separation, for example between Jewish fund raising and Jewish identity? Fund raising is profound Jewish expression. It is Jewish culture. Jewish responsibility is indivisible. And that is why the agenda for war and for peace are obverse sides of a single agenda. (48)

Full page newspaper ads sponsored by the New York Federation and UJA appeared all over the country - "We Are One".

All of this stressed Jewish solidarity and commitment to the Jewish causes. Jews give because they care about the survival of Judaism and are determined to preserve it, however vaguely practiced or understood.

Let us not overlook the fact that American Jews are very involved in secular affairs. There has been good historical precedent, Biblical and Rabbinic teaching and a feeling of belonging as Americans and good members of the total community. "It has been estimated that Jews give about one-fourth of their annual charitable contribution to non-Jewish organizations." (49)

Volumes have been written about Jewish philanthropy - indeed it is an awesome record and a glorious page in world history.

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<sup>48</sup> Milton Goldin, Why They Give (New York: Macmillan, 1976), p. 235

<sup>49</sup> Yaffe, p. 169

## PART II

## ENDOWMENT FUND

Throughout the history of Judaism, Tzedakah (charity, giving) has been taught and practiced in many and varied ways. The founders of Christianity adopted and continued to develop this system as the mechanisms of the church and related institutions grew. The philosophy of Tzedakah has become part of the very fabric of American society through the influence of the Judeo-Christian heritage.

The synagogue and the church are only part of the involved network of a highly organized charitable system. The United Way, Red Cross, Boy and Girl Scouts of America, community centers and peace drives are only a small sampling of the thousands of worthwhile groups that try to appeal to the sensitivities and sensibilities of Americans.

The dollars are coveted by many and so it is important to develop a well-planned program that will encourage both the small and large givers to become an integral part of the institution.

People become interested for many reasons. The Temple has an historic and religious advantage. Its appeal can be on a personal basis, a spiritual foundation, the fostering of group responsibility, continuity of identity and individual honors and praise.

It is still a constitutional practice that church and state are not mixed, however, most of the founding fathers were well schooled in the Bible and were deeply religious. Our government has developed a system of laws that enable corporations and individuals to give tax-free dollars and allow deductions for charitable purposes. These "tax breaks" have caused individuals who were

perhaps not spiritually moved to increase their charitable donations. Because of the obvious advantages that occur to them, they will become more charitable. Literally billions of dollars are contributed every year and religious institutions receive over 50%.

Despite historical precedence and sympathetic governmental aid, it is becoming more difficult to sustain private institutions, particularly those that are religiously oriented. Better planning, more sophisticated devices and peer pressure must be brought into play if an effective program is to be developed and sustained.

Tithing, dues, celebrity series, games, dinners and carnivals will not impact our people. Most of our Temples have a well defined dues system and many are trying to develop a Fair-Share giving system. This philosophy is a step in the right direction but has proved that it cannot raise sufficient funds to sustain the growing budgets in our institutions that are affected by inflation. It is incumbent upon the lay, rabbinic and professional leadership to plan and work together towards a successful Endowment Program.

An Endowment Program will insure the future stability of the Temple and in the present, provide interest and dividends from the investment of funds to supplement the budget. We must also recognize the need for extra funds for physical improvement and constant repairs, special study programs and retreats. Special philanthropic endeavors within the Temple Family can be supplied from the Endowment Program.

A proper Endowment Program will be so structured that every member of the congregation will have a reason and a vehicle for contributing. Everyone must be made to feel important and indispensable.

### Initial Stage: Planning

It is important that we lay proper ground work in order to assure future success. Our first task is to present the concept in a fashion which will be acceptable. In order to achieve this a meeting with the professional staff, and in particular, with the administrator, who will be the implementor, must take place. It is important to have an open and free discussion on the concept of an Endowment Fund and to gain support by having them delineate those areas in their particular department or responsibility which requires additional funding in order to be achieved. This will be helpful in the future when we outline the purposes of the fund. It will also give them a feeling of being part of the development of this important project. It will be of further advantage in that they will be able to speak with considerable insight and knowledge of the program to the laymen.

There should be a number of meetings between the rabbi and the administrator. Both should be involved in developing the concept and the original presentation. The decision as to who should be contacted first and the plan of action to follow is one that should be developed jointly.

The first approach should be to the president of the congregation. In each case, both the rabbi and administrator should be involved in these contacts. The appeal to the president should be on the basis of the needs of the congregation. The rabbi should present the concept from a spiritual point of view; the need for securing the future and the responsibilities of the Jew as outlined in the Torah and Talmud. The administrator can discuss the matter from a more practical point of view, pointing out the accomplishments of the institution in the past. He must be prepared with statistics. Also, he must point out the importance of securing the future. The facts of expenditures



constantly being affected by inflation and income not keeping pace should be stressed. An appeal to his ego should be made indirectly by pointing out that it would certainly be recorded for posterity that it was during his administration that this important project was launched. The rabbi can further point out and emphasize life-cycle events in that person's family which could not have taken place if the synagogue were not there.

Similar approaches should be made to the other officers of the congregation and key members of the Board of Trustees and the Past Presidents advisory group who will later be called upon to serve actively. A definite commitment to the project should be obtained from each of the persons who are spoken to. Opening questions should be asked of these individuals in order to get suggestions from them and to give them a feeling of participating in the initial stages of the program.

An initial presentation in writing should be prepared for the Board of Trustees incorporating the suggestions made by the individuals who were contacted. The oral presentation at the Board meeting should be made by one of the officers. This should be followed by an appeal and a charge from the rabbi to the Board. Further details as to the needs of the congregation, both present and future, could be developed by the administrator. The goal is to receive endorsement of the concept by the Board.

The matter can be further embellished by reciting the successes of similar congregations throughout the country with Endowment Programs.

Careful note should be taken of the comments from the members of the Board from the initial presentation. These will be valuable in guiding you through the development of a more detailed presentation on the mechanics and organization of the fund and program.

Utilizing the rosters of the National Association of Temple Administrators and the Central Conference of American Rabbis, a request should be circulated asking for copies of their bylaws relating to an Endowment Fund and any additional information that they may have. It would be well to ask for copies of the minutes of their Endowment Board or excerpts from same. Also a request should be made for presentation and promotion material that is available.

A proposed draft of a bylaw amendment should be prepared for the Bylaw Committee. The amendment should contain the stated purpose of the fund, protection of the principle, a definition of the fund itself and the manner of contributing to the fund. An outline of this bylaw amendment is as follows:

- a. The Endowment Fund shall be the depositor for all gifts, endowments and bequests, not otherwise designated by the donor, and all contributions made by Members in Perpetuity.
  - (1) The income from this fund shall be used to:
    - (a) Maintain and expand the religious, educational, cultural, social and philanthropic activities of the congregation;
    - (b) Augment the needs of the annual operating budget.
  - (2) The Board of Trustees shall be empowered to use the principal of the Endowment Fund, if income therefrom is sufficient to cover expenses incidental to the maintenance of donated real properties, including taxes, insurance, interest and repairs.

A Polished draft of this bylaw from the Bylaws Committee, should then be presented to the Executive Committee. Their comments and suggestions should then be incorporated and the final draft be presented to the Board as

part of the presentation package for their approval. If they accept it, the amendment should be presented at a meeting of the congregation for their acceptance. It is of the utmost importance in all cases to provide for feedback and suggestion.

The second presentation for the Board of Trustees should include the following items, with a full description of each: 1) Need, 2) Goal, 3) Time, 4) Organization and Development, 5) Methods of contribution, 6) Structure and 7) Proposal for a Board of Directors for the Endowment Fund.

This entire presentation should be mailed out to each member of the Board prior to the meeting for their study and comprehension. Attached to this presentation should be background material on each of the items stated. Approval should be sought on the amendment and the total presentation. Again, careful note should be made of the feed-back.

It must be clear at all times that once the professional has performed his function as an enabler, it is up to the volunteer lay leadership to make all the basic decisions. This is no place for an ego trip for the professional. He must, of necessity, bury any thoughts of self-credit in order to insure the success of the program.

Understanding and respect for each other's point of view and area of confidence will be exceedingly helpful. The professional has community knowledge, experience in fund-raising, the information necessary by which leadership makes decisions, knowledge on how the campaign is to be conducted, and organizational skill insofar as clerical and record-keeping. All of these will free the volunteer or layperson for the basic job of deciding: 1) The scope of the campaign, 2) The type and 3) The actual job of solicitation.

The professional is a key figure in voluntary philanthropy, for it is

he who is the first point of contact. He cannot compete with the very people he is trying to motivate. He must be gently aggressive and submerge his own strivings. In summary, the professional's role is the enabler, and the layman's role is solicitor and policy maker.

At this meeting of the Board of Trustees, the individual for whom the Endowment Fund is to be named, should be presented to the Board. This should come as a direct recommendation from the Executive Committee. They will have acted on suggestions which are brought forward by both the rabbi and the Executive Director. The individual so selected, should be someone for whom there is great admiration and respect in the community, a long time association with the synagogue, a key role in its development, and a person whose reputation will be attractive to the potential donors. In this case, the name of Rabbi Raphael H. Levine is to be presented. As Rabbi Emeritus of the congregation, he has served the congregation for almost 38 years, and is beloved not only by his congregation but by the community in general. His social action activities have earned him the admiration of the community.

The key person on whom hinges the success or failure of the total campaign is the chairman of the Endowment Program. The individual selected should be a person who has demonstrated his devotion and dedication to the institution, is intelligent, and has attained a position of respect and influence in the community. He should have status, have demonstrated his philanthropy and should be active in the community. It is an obvious truth that he will have the potential to attract to himself the same type of individuals and thus help upgrade the entire campaign leadership.

It is important to "feel out" those being considered, to see if they would have an interest in taking on the responsibility. The list should be narrowed

down to three or four people and presented to the Executive Committee for discussion. These should personally be contacted by the President of the congregation in order of choice. It is extremely important that a proper outline of responsibilities and all pertinent information about the Endowment Fund be prepared for the individual being considered. The following is an outline of proposed responsibilities of the chairman.<sup>(1)</sup> It is desirable that all of the foregoing be developed within a two month period.

#### Secondary stage: Operation

We are now at the point of establishing a Board of Directors for the Endowment Fund. This is to be a policy-making body which will give direction to the campaign and develop broader policies as to use of the money and the manner in which it will be invested. A second bylaw should be prepared containing a description of the Board of Directors and the specific conditions under which they operate. The following is a draft bylaw relating to this board:

Section 1. There shall be a twenty-four (24) member Board of Directors to administer the Raphael H. Levine Endowment Fund.

Section 2. Directors shall assume their duties at the time of the first Board meeting following their election. Eight (8) Directors shall be elected at each annual meeting and shall hold office for three (3) years or until their successors are elected. No member shall serve more than three (3) consecutive terms. (At the annual meeting in 1978, eight (8) shall be elected for three (3) years, eight (8) shall be elected for two (2) years, eight (8) shall be elected for one (1) year.

Section 3. Meetings of the Board of Directors shall be held quarterly, and on call of the Chairman, or by petition of five (5) members of the Board of Directors.

Section 4. The Board of Directors shall elect from its own body a Chairman, Vice Chairman, and Secretary, each of whom shall

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<sup>1</sup>See appendix A.

serve for a three (3) year term.

Section 5. The Board of Directors may establish committees to carry out its functions.

Section 6. Vacancies on the Board shall be filled at the next annual meeting of the congregation.

Section 7. Thirteen (13) members of the Board of Directors shall constitute a quorum.

Section 8. The Board of Directors of the Endowment Fund shall, subject to ratification by the Board of Trustees, establish and implement a fully developed Endowment Program to meet current and anticipated needs of the Congregation, including the promotion of bequests, memorials, and membership in perpetuity; organize, develop and conduct special campaigns in support of the Endowment Fund; recommend and/or implement new/innovative programs for contribution to the Fund; consider special requests for restricted disbursement of contributions and make recommendations on same to the Board of Trustees; work with the Investment Committee as to the investment of funds contributed to the Endowment Fund; recommend, as necessary, use of income from such investments; and develop programs for recognition of donors to the Fund.

The Board must be chosen with great care, always keeping in mind the ultimate goal of a successful Endowment Campaign. In cooperation with this, the short and long term effects of the campaign on the congregation are important.

Participation is the prime ingredient for a healthy organization. With this in mind the leaders of the congregation and their Campaign Director must, even though it is most time consuming, go over the entire congregational list in consort with the rabbi and the Executive Director. Enough information should be gathered to select a Board that will touch all facets of the Temple Family. Some people will be chosen because of the leadership roles they have held in the congregation, others for their community activities, some because of their potential leadership qualities and some because of the honor they may feel, so that not only will they solicit, but they will contribute.

Everyone must be approached on an individual basis, a form letter will not suffice, the matching of people is very important. A telephone call is

generally ineffective, all contact should be on a personal basis. It is best to ask someone who is involved in the campaign to call upon an individual that they already know. When the new members accept the challenge, more detailed information can be given them as to their responsibilities, the reason for and goals of the Endowment Campaign.

The names and pictures of the Board should be given great impact in the Temple Tidings and the local Jewish Press. If they are community leaders the local press should also be informed. These appointments must be given a high priority so that people will seek the appointments and readily accept them. A service can also be created to honor them and sermons extolling the virtues of volunteerism can be given.

Credibility of the Temple and its leadership are imperative to the success of the Campaign. Temple De Hirsch Sinai, as an institution, has a record of social leadership in the secular community. Its members are active leaders in the business and professional world. It is the largest and most prestigious congregation in the Pacific Northwest. Temple De Hirsch Sinai is the largest congregation west of the Mississippi and north of Los Angeles, but size alone does not determine its greatness. Temple has helped to establish the Council of Jewish Women, the Jewish Family Service, the Kline-Galland Home, and the Jewish Community Center. In the 82 year history of the congregation, there have only been 3 senior rabbis. This shows the stability of the congregation and the attributes of the rabbis.

An ongoing publicity campaign must be carried out. There are enough experts in the congregation to get voluntary help and advice, however, experience has taught us that an overall coordinator should be chosen and it may be worth the expense of remuneration to hire this individual.

Whoever handles the publicity, it is imperative that complete honesty be established from the beginning. In communications, the congregants must be informed of the needs, goals and progress of the campaign. It is important that the people be made to realize that it is their responsibility to take care of others who are less fortunate. We must stress that we live in a changing society. Single parent families are more numerous, unemployment is increasing. It is not Jewish that these people not be welcomed into the congregation and made to feel at home. The congregation must also be reminded that the physical plant must not be allowed to deteriorate because of safety and aesthetics as well as the image they portray to the community.

There is a myriad of data and statistics that can be used to provide the congregation with information. It must be selected carefully, used and disseminated with artistry and good taste. The publicity should appeal to the heart and mind.

The Endowment Fund will be further publicized by a circulation of the proposed amendments to the bylaws. A discussion which will ensue at the annual meeting to adopt the bylaws, will of course have a salutary effect. Again, it is important to be aware of the feed-back from the congregation. The presenter of the amendments should be the proposed chairman for the Endowment Fund. This will provide the exposure that is necessary and also, exude a feeling of confidence within the congregation.

In order to assure that organization and lines of communication are not snarled, it is desirable that an organization chart be set up. In order to do this properly it should be pre-determined as to what supervisory and leadership roles will be required in order to carry out an efficient and successful campaign. The following is a proposed organizational chart with the chain



of command.<sup>(2)</sup>

Proper orientation and motivation of the Board members is of paramount importance. If at all possible, a retreat of one or two day duration would be the most desirable means with which to conduct this orientation. Not only should all the basic aspects of the Endowment program be discussed, as well as the structure and organization, but there should also be a special program feature conducted by someone with expertise, or in fact, a panel of experts, discussing some aspects related either to endowments or charitable giving.

The agenda for this orientation meeting should be sent out in advance to the membership together with a packet of materials relating to each item on the agenda. The following is a proposed agenda for such a meeting, with the attached materials.<sup>(3)</sup> It is important that the agenda be drafted by the Executive Director, and the rabbi in consultation with the chairman of the Board of Directors. The orientation meeting should take place within one month of the Board members being elected.

The term "public relations" is often misunderstood by the general public. Because they are inundated with media material of all kinds, people become cynical and suspicious. They are used to being sold products that they do not want or need.

Public relations of religious institutions must have a different flavor. It also must be realized that a campaign cannot be mounted overnight but must be ongoing in the historical process of the congregation. For instance, you cannot suddenly produce love and spirituality - this must be part of the fabric

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<sup>2</sup>See Appendix B

<sup>3</sup>See Appendix C

of belief. However, the campaign does need public relations and if used properly it can reemphasize and fortify the positive aspects of the Temple, staff, programs, physical plant and community relations. It must also be stressed, how the Synagogue is indispensable in the life-cycle functions of the congregant from birth to death. This must be transmitted to the congregants who will be selected and to the volunteers who will be the campaign leaders.

People are often critical of fund raising campaigns because they believe too much money is spent on public relations. This may be a rationale for not giving, so we must be prudent in our budgeting for public relations.

We are all aware that regardless of the methodology, nothing replaces people to people contact.

At the first meeting of the Board of Directors, the chairman should appoint a chairman of the Public Relations committee. He should be someone who has had experience in the public relations or journalism field and have enough stature and influence to attract others from his field onto the Public Relations committee. Research should be done to find the people with a public relations background and expertise from the congregation with particular skills that will be essential, such as: graphic artists and designers, journalists, writers, artists and creative thinkers. The duties and responsibilities of the committee should be as follows.<sup>(4)</sup> This committee will be organized with an eye to becoming on-going. It will not be established merely for the initial campaign but will continue to provide means and methods of properly promoting the several different programs and projects that the Board of Directors deem feasible for the congregation. One such project will be

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<sup>4</sup>See appendix D

a beautiful, well thought out brochure for the initial campaign, a draft of this brochure follows.<sup>(5)</sup> Assignments and deadlines should be presented to the committee at the outset.

It is important that there be a meeting with the chairman of the Public Relations committee, the chairman of the Board of Directors, the rabbi and the administrator, in order to discuss in broad terms what would constitute a good promotion campaign and what it is that we are trying to convey. At that meeting the list of those with expertise in the field should be presented and there should be a careful selection of the committee. A letter should then be sent out signed by both chairmen, appointing the individuals to the committee and advising them of the first meeting. This meeting should take place within two weeks following the original meeting with the chairmen. Letters should immediately be sent out to a number of congregations asking for samples of their promotional material.

Every good fund raiser knows the value of educating the prospect so that he becomes knowledgeable about the cause and its needs. However, we must also accept the fact that it is difficult, if not impossible, to get groups of people together to listen to a story about a project when they know full well that they will be asked to give of their funds. They are convinced that they will hear nothing new and are not going out of their way to learn about a cause for which they will be asked to contribute. So the thrust should be: 1) To educate small groups with special interests, in small quality doses, ie. Board of Trustees, Past Presidents Advisory group, etc. In other words, people who have a special relationship to the project; 2) Gear special programming to

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<sup>5</sup>See appendix E

provide benefits for the individual so that he can receive rather than give;  
 3) Make use of captive audiences, the rabbi speaking from the pulpit on the project, another person from the Board being asked to speak at a meeting of some of the auxiliaries.

At that first Board of Directors meeting, a chairman of the Program sub-committee should also be appointed. He/she should be a person with all of the criteria stated heretofore, except they should have a knack for organization and setting up programs such as are anticipated here. Again, the responsibilities of the committee should be carefully outlined as follows.<sup>(6)</sup>

We are aware that there are three particular groupings which can provide particular assistance towards the success of the Endowment Program. They are the accountants, attorneys and insurance people. In order to gain their support and assistance, a special orientation luncheon should be set up for each of these groups at a reasonably nice restaurant. A formal invitation should be sent by the chairman of the Program committee and the chairman of the Board of Directors. These luncheons should be set up one week apart. They should be assured in the invitation that the meeting will be over by 1:30 at the latest, therefore, the luncheon has to be carefully organized. A panel comprised of the chairman of that particular grouping, an expert on charitable giving and the tax laws, the rabbi and one other expert should be formed. Each should be given a limit of 5 minutes to speak and there should be a 15 minute period for questions and answers. The Endowment brochure should be made available at these luncheons. There should be no soliciting at the luncheon itself, however, the chairman of that grouping should organize the solicitation teams

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<sup>6</sup>See appendix F

in order to see each of these persons in their office. The main purpose of the luncheon, other than to educate these people on the Endowment Fund, is to get a commitment from each of these groups that they will keep the Endowment Fund in mind and should the opportunity present itself, encourage their clients to participate.

It should be understood that prior to all of these functions and responsibilities being fulfilled, there should be a meeting, not only of this sub-committee, but of the Public Relations sub-committee in order to lay out a plan of action. A proper agenda should be worked out with the chairman in consultation with the rabbi and administrator. The game plan should be discussed ahead of time and the chairman of the Board of Directors should also be kept informed. It may be a good idea to involve him in these discussions as well. It would then be necessary to work the plan and establish goals through deadlines that are predetermined.

The Campaign chairman is the pivotal and spotlight person in the entire structure, for it is this person who will set the tone for the entire campaign. The criteria for selecting such a person should include someone who has status and stature, is completely supportive of the campaign, has demonstrated leadership, is highly respected, has demonstrated generosity and can be counted on to contribute to the maximum of his means. It should be his responsibility to fulfill the following:

1. Help in the selection of vice chairmen and a campaign cabinet of five people.
2. Meet directly with the people selected in order to gain their support and involvement by giving them orientation on the Fund and further outlining to them their duties and responsibilities. (These people should then be presented at the next meeting of the Board of Directors in order that they may be properly elected.)

3. Help establish policies with regard to soliciting.
4. Help set the goals.
5. Meet regularly with the campaign cabinet for purposes of coordination and direction as well as motivation.
6. Address all of the solicitors at one time.
7. Speak from the pulpit at a Friday evening service.
8. Work in close consultation and cooperation with the chairman of the Board of Directors.
9. Work closely with the administrator and the rabbi.

It is up to the professionals to see to it that the campaign leadership is spared any involvement with minor details. They should only be involved with major decisions and action. The details should be handled through the Temple office. Follow-through on requests from the campaign leadership should be expedited and given every consideration.

Each of the vice-chairmen should be given the responsibility of working with a number of divisions. It will be their job to see to it that a schedule is followed and that there is follow-through by the captains of those particular divisions who will report to them regularly. They are also to be trouble-shooters in case any problems arise. The vice-chairmen would then report to the entire cabinet on their progress and any special situations that need attention.

In order to develop an effective campaign, it must be recognized early in the game that sloppy "in-house keeping" will be the most definite turn-off that there can be for the solicitor. You simply cannot afford to make mistakes. In this regard then, the campaign has to be carefully thought out and organized. You must establish an achievable goal which will also produce the results desired to meet the needs of the congregation. A period of time

to accomplish the goal should be set forth. This is an item which should be presented to the Board of Directors for their approval.

It is of utmost importance that the rabbi be involved in every phase of the campaign and that the Executive Director's expertise be used expeditiously. There should be an ongoing dialogue, with both the rabbi and the Executive Director working closely together so that there will be no duplications.

The schedule of the campaign must include all events and be publicized in the Temple Tidings. Personal letters and postcards should be sent as invitations and reminders to those individuals involved with the fund raising.

The campaign leadership should be thoroughly organized and divided into specific groupings.<sup>(7)</sup> The overall organizational chart should be thoroughly discussed with the key figures in the campaign, the overall chairman and the chairman of the Board of Directors. Their input and approval is necessary before the organizational aspects are presented to the campaign cabinet.

There are 5 basic facts that the campaign leadership must be aware of in order to create a successful campaign. First, people relate better to individuals than to abstract projects. Second, peer pressure is important when used properly; social, emotional and business pressures must also be brought into play. Third, solicitors must continuously pursue their prospects. Fourth, the contributor must be lead strongly and properly by the solicitor to contribute at the level that has been predetermined by the solicitor. Fifth, people do not always adequately respond to the real needs of an institution or campaign but to the pressure exerted on them by their community, family and commercial connections.

The solicitors are the key people in the success of the campaign.

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<sup>7</sup>See Appendix G

Foremost of course in the money that is raised, but perhaps in the long run, there are many other benefits that can accrue to the institution. That is why it is so important for the solicitors to be well informed and present a positive picture of the Temple. There can also be important feedback from the prospective contributors that the solicitors can convey to the leadership of the Temple.

Regardless of how well structured a campaign is, the philosophy and psychology of the people involved is of utmost importance. We must recognize the need and drive of both the solicitors and the potential contributors.

We are a materialistically-centered society. A major part of the media advertising thrust is based on the image of "beautiful people" and the accumulation of wealth and prestige. The expression "money talks" is very apt, particularly at a peer level. When solicitors approach potential givers many stimuli are working, such as: position in the community, congregation, family and business world. Everyone needs acceptance and most people want to be well liked. They are also concerned about their reputations. Knowing this, it is important to appeal to their self-image.

With Jews it must also be kept in mind that we are a people of history, memory and tradition. When we appeal to a Jew to give to a Jewish cause these factors must be brought into play. A psychological appeal by the solicitor can involve playing on a potential giver's fear of assimilation, acculturation, intermarriage or thoughts of the past, such as genocide and the holocaust. Foremost in the minds of all should be the statement of the Pirke Avot: "Do not separate yourself from the congregation". Since Judaism has always stressed the group, "Klal Yisroel" - the community of Israel, even the most minimal Jew can be appealed to on guilt and preservation.



It is imperative to have a well organized campaign. Therefore as many people as possible should be involved. All groups, from the wealthy to the poor, the professionals to the blue-collar workers, must be asked to participate. From these groups will come the specialists, captains and workers. Realizing, of course, that the big money will come from a small but most powerful segment of the congregation, their leadership is vital.

Everyone regardless of their "expertise" must be involved in well planned training sessions. It must be remembered that even if some are experienced solicitors that basically they are still amateurs. The only real professionals are the rabbi, the Executive Director and/or if a paid professional is brought in to lead the campaign.

In order for the contributors to be inspired, the solicitors must first be inspired. They must be given confidence, knowledge, techniques and information. It is a good idea to role-play and to have "pep-talks" to air positive and negative aspects about the Temple. A free-flowing discussion must be part of the meeting between the solicitors and the leaders but an agenda must also be adhered to. A minimum of 6 training sessions are essential. The rabbi and the Executive Director should be responsible for the training sessions with the rabbi supplying the Judaica and the Executive Director dealing with the technical moves of solicitors.

When the solicitors are ready to begin the campaign they should be supplied with a list of prospective givers. It is obvious that much work must go into the preparing of this list. This should be done by the Executive Director, the rabbi and people in the congregation who know the membership. Realistic goals should be set for each member. These goals should be stated on the prospect list together with as much information as necessary for the

solicitors, such as: marital status, business, previous contribution levels, dues to the synagogue and membership in Jewish and fraternal organizations and clubs. Everything must be clear and concise.

The solicitor must always keep in mind the sensitivity of telling someone how much they should give; there is a normal resentment and it is counter-productive. Everyone must be made to feel important in this campaign, but naturally special emphasis must be put on those who are able to carry the major portion of the giving.

Experience and common sense teach us that only one who has the dedication and the ability to give a large gift can approach a potential large contributor. It is essential that before the solicitors see others that they make their pledges themselves. This not only gives the campaign a good start but is extra motivation to inspire the solicitors to get more from the congregation.

The solicitors must be honest in telling the campaign leaders how much time they can spend on soliciting. In that way, no one will be overburdened with too many cards.

It should be apparent during the training sessions, and also by past records, which solicitors will be most effective. Therefore, they should be the core group in making appeals to the congregation.

There are five elements that go into a proper solicitation: 1) Advance appointment, 2) A meeting free of interruption, 3) A brief presentation of needs and objectives, 4) A statement of what others have given, including the solicitor, and 5) Finally, a suggestion to the prospect that he consider making a gift in a specific amount. There could be a 6th - that is a closing, at this point you hand him a card and ask him to sign.

Every effort should be made to predetermine the hidden agenda of the

prospects. Notations should be made on the prospect card of these factors. What is meant here, is that if the prospect has sold some property at an appreciated price, or some stocks that have appreciated, or he wishes to have something to honor a parent who is recently deceased - all of these items will come into play, and the solicitor should be aware of them.

Another point on solicitation is that double teaming on a prospect is sometimes very valuable, in that the prospect is impressed that two people should take time out to come and see him. It is also important that there be some connection between the prospect and the solicitor so that they have more than a fleeting acquaintance with each other.

Another means which has proven effective is the parlour meeting where the campaign chairmen will set up either a cocktail party or an evening at their homes and invite potential big givers for the evening. At least two people should have established that they will commit to a gift of major importance before the evening so they may announce their intentions at that time.

We cannot mince words with the Board of Directors or the Board of Trustees, for it is incumbent upon them, because of their position, to set the pace. They cannot vote for the project with one hand and not give with the other.

It is imperative that the division leaders constantly follow-up on the solicitors and they in turn should be in constant communication with the vice-chairmen.

It is of the utmost importance that people are recognized both for their efforts and for their gifts. In this case, a specially selected committee should determine suitable awards and certificates to be presented to the

donors and to the solicitors. A means of providing public recognition to the donors will generate even more gifts and of greater consequence. A specially designed plaque situated in a position which is constantly seen by the public would be desirable.

A letter should be sent out with the signature of the president thanking the donor for his gift. This accomplishes two things, 1) It gives additional recognition to the donor and 2) It is a form of confirmation of the gift. This should be done in addition to the fact of having the donor sign the pledge card.

A means should be devised of showing the progress of the campaign on a weekly basis. This also should be placed in a conspicuous area. Constant progress reports should be placed in the Temple bulletin and timely letters should be sent from the chairman of the Endowment committee to the Board of Directors and possibly a new letter to the solicitors advising of the progress. Since this project is on-going and will be carried on, hopefully, in perpetuity, letters from the rabbi and from the president exhorting the congregation to participate in the Endowment Fund should be sent periodically.

Finally, it is important to establish a proper Investment committee who will oversee the investment of the income to the Endowment Fund. The committee should be made up of experienced investors and a professional investment counselor. Guidelines should be established by the Board of Directors with a constant review of the portfolio by the Board of Trustees. The Investment committee should be defined as follows:

The Investment Committee shall consist of eleven (11) members. The Chairman and at least two (2) other members shall be members of the Board of Trustees. At least five (5) members of the previous committee shall be reappointed each year. The Investment Committee shall have the authority to direct investment of all funds subject to policy

established by the Board of Trustees. It shall have the authority to retain and consult with Investment Counselors. It shall maintain a written current status portfolio of investments, with appropriate comments for the Board of Trustees and report at each meeting of the Board. A majority of those present and voting shall be necessary for decision on investments. No member of the Committee shall become liable or accountable for losses incurred unless caused by bad faith or gross negligence. Seven (7) members shall constitute a quorum.

We have given particular attention to the mechanics and organization of the campaign, but no mention has been made as yet of the methods of giving. The letter of intent is preferable to the pledge card, in this case, and is a most important document. We should never leave ourselves in a position where we cannot offer the prospect a choice, for it is far easier to refuse a singular proposal. The following methods for giving shall be offered.<sup>(8)</sup>

#### Final stage: Evaluation and Assessment

There is only one major assessment that has the most bearing on the success of this program, and that is, if the goal in dollars and cents has been attained or how close we came to it. It is also important to determine if it was an achievable goal and realistic for our congregation. There are many factors that will have to be dealt with in order to truly make this determination. The question of how much money was raised and whether, in fact, it will come close to meeting our current and future needs is of great importance, for this will determine just how much effort will have to be exerted in the future in order to come up with the additional funds. It is important, therefore that the assessment be done at regular intervals during the course of the campaign.

Time is a very important commodity, not only in terms of getting things

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<sup>8</sup>See appendix H

done, but in terms of the reluctance of people in parting with it. Each phase of the campaign must be examined in the light of whether deadlines which have been set, have in fact, been met or even beaten. Should this not be the case, then it is important to examine the reasons why, so that the campaign can be conducted more efficiently in the future. There is always the possibility that the deadline set was unrealistic in the first place. Where deadlines have been met, it is important to examine the components that made that happen, so that they can be duplicated in other situations.

In order to effect the first two (time and goal) a working chain of command is necessary. It is therefore an important factor to evaluate. How effective was it? Did it help in organization? Was there a weak link and if so, where? How smooth and how effective the campaign was will relate directly to this particular area. Proper coordination of the entire project, including all of the programming, solicitation, and follow-up, is the success factor. How well this has been implemented will have a direct bearing on whether the goal has been reached, for any breakdown in any given area of the program will have a direct effect on all others.

The development of the various divisions will have to be analyzed as to how successful each of the divisions was; whether the proper people were heading them and whether or not it was a proper division in the first place. Evaluation should be made on using the criteria of numbers, affluence and past history of charitable giving.

Another major factor in a successful program is people and their involvement. How many people were involved, what groups were represented and how diverse. To what degree people were selected and utilized in leadership roles and how effective they were, are all useful to us to measure the success of

people involvement. Leadership can best be measured by the success of the workers who were directly responsible to them. It is important in all of this to examine the relationships of people. What interaction took place between individuals and between groups? Who was responsible for motivation? How effective were they and what further stimuli aided in the development of this important action?

People, their organization and the effective use of their time are the three major areas directly effecting the attainment of the first, namely the goal.

Public relations is not only an effective tool, but should be a by-product of the entire campaign, that is, good will for the agency or institution should be established and this can only be measured through feed-back. How effective were the orientation sessions? Were the instructors adequate? What percentage attended of those invited? How well were materials prepared? Were all the necessary areas covered? Accurate and efficient records and record-keeping are without question the most effective and absolutely essential tools to be utilized in a campaign. This, of course, will effect public relations on both the workers level and those being solicited. Thus, the areas of prospect cards, assignments, follow-up, rating verses pledge and proper accounting, must each be reviewed and measured.

The most effective means of accomplishing the total evaluation of the entire project would be survey forms covering the most essential items. The forms should be simply designed to make it as easy as possible for the person to complete and yet provide us with accurate results.<sup>(9)</sup>

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<sup>9</sup>See appendix I

If at all possible, the most desirable method of handling the results would be to feed them into a computer that has been programmed for this purpose. The computer could then provide us with an analysis and a summary of the results attained. Failing this, matrix could be worked up relating acceptable goals of the directors and the key professionals to the average results of the evaluation forms, relating time to people and relating the goal to discernable results. A matrix could also be created relating leadership to the workers.<sup>(10)</sup>

Parts of this evaluation and assessment should take place at regular six-month intervals. A final assessment should take place at the end of the three year period. Changes in attitudes and results should also be recorded.

It must be remembered at all times, that although the stated time for this campaign to be completed is three years, it nevertheless will be an ongoing process and whatever is learned from the experience will prove to be invaluable to future endeavors.

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<sup>(10)</sup> See appendix J



APPENDIX

## APPENDIX A

ROLE AND RESPONSIBILITY OF THE CHAIRMAN, BOARD OF DIRECTORS  
RABBI RAPHAEL H. LEVINE ENDOWMENT FUND

The chairman shall be elected for a three year term from amongst the members of the Board of Directors. He/she shall fulfill the following responsibilities:

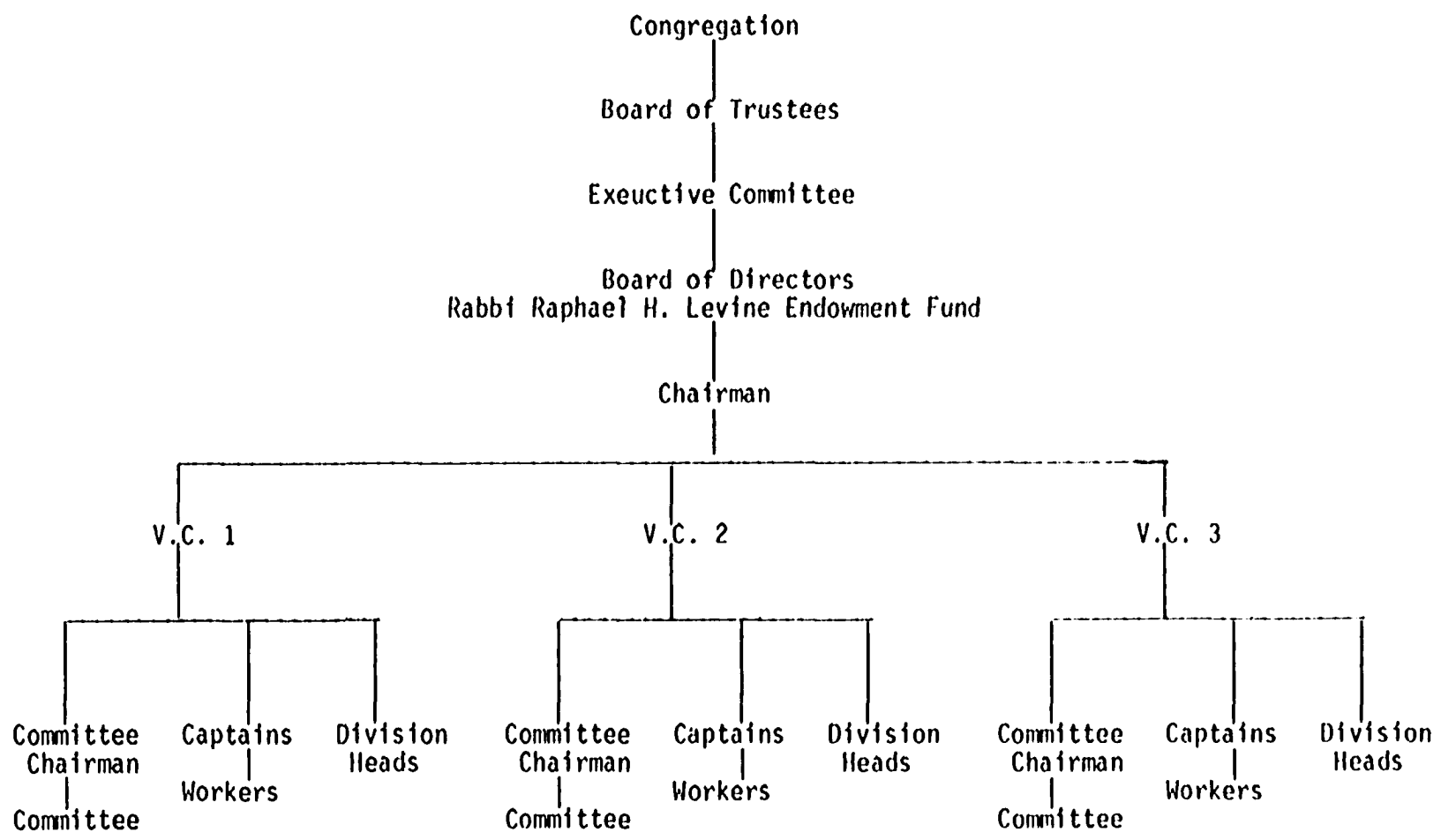
1. Be a member of the Board of Trustees and attend all the meetings of that body.
2. Call and preside at all meetings of the Board of Directors.
3. Determine the Agenda of all meetings.
4. Appoint chairmen and committee members to committees and sub-committees of the fund.
5. Coordinate all of the activities of the fund through the appointed or elected officials.
6. Report on the activities of the Endowment fund to the Board of Trustees and seek approval of policies determined by the Board of Directors of the fund.
7. Help stimulate contributions to the fund in consultation with the Executive Director and the Senior Rabbi.

The vice chairman shall serve in the absence of the chairman and fulfill all of his/her responsibilities. He/she shall also fulfill any responsibilities in connection with the Endowment fund as directed by the chairman.

APPENDIX B

ORGANIZATION CHART

RABBI RAPHAEL H. LEVINE ENDOWMENT FUND



## APPENDIX C

RABBI RAPHAEL H. LEVINE ENDOWMENT FUND  
BOARD OF DIRECTORS MEETINGA G E N D A

1. Introduction and background information - Arnold Robbins
2. Presentation on Endowments by Trust officer - William C. Blanchard  
Seattle First National Bank
3. Nomination and election of chairman, vice-chairman and secretary  
of the Board for a three-year term
4. Terms of office for the Board of Directors
5. Explanation of the goals and objectives
6. Suggested programs and options
  - a. One-year campaign with all accepted options (short term)
  - b. Selected programs (long term)
  - c. Continuing campaign for new members
  - d. Panel of experts - response to queries on details of the  
program
7. Selection of the chairman of a permanent Public Relations and Pro-  
motions Committee
8. Establishment of a legal consultants panel
9. Recommendations re initial campaign
  - a. Organization outline
  - b. Selection of chairman and 2 vice-chairman
  - c. Chart of organization
10. Development of a Program Committee (estate management)
  - a. Explanation
  - b. Selection of a chairman and vice-chairman

PROPOSED OPTIONS, PROGRAMS, AND METHODS OF ENDOWMENT  
(Re: 6a, b, & c Agenda Items)

Short Term Income Trust

There are several other methods I would like to mention in lifetime gifts or contributions. One of the major tax procedures that can be used and which is not used is the Short Term Income Trust. If we have a congregant who has for some reason over a period of two or three or four years an unusual influx of income, income that will go out in a high tax rate, this taxpayer can set up a short term (2 year minimum) trust where the income from the properties is put into the trust. It can be payable to a charity or to the synagogue. It is non-taxable in his report. It goes fully to his charity or to his synagogue.

Standard Trust

The other method that the lifetime giver can use is the Standard Trust with the synagogue as the beneficiary either for all the income or any portion of the income. The giver sets up a permanent trust and transfers certain properties and the income from the trust which is administered usually by a trust company or a bank but sometimes by individuals. The income from it is paid to a beneficiary and if he designates a synagogue or charity, of course, it is beneficial.

Testamentary Gifts

A second category is the Testamentary Gift. In testamentary gifts, again, it can be just a designation in the will of an outright sum of money or property. In our federal estate taxes, any gifts set

out in the will are not subject to the estate or death taxes. It reduces the total tax problem or tax liability of the estate. There can be times when the estate is high enough that the net loss of the estate is a very small percentage. For example, in a high bracket estate a \$10,000 gift may cost the heirs, because they would be the ones who would probably retain it if a gift to the synagogue was not made, anywhere from \$2,000 up to \$9,000 depending on the rate. But there can be a tax saving even to the heirs in the will.

Each state has similar exemptions or credits in the estate or death tax rate for gifts to chairties and synagogues. They have usually some limitations. For example, New York has a limitation where I believe only 15%, if there is a widow or children, can go to one charity. Some states have no qualifications. You should check on your own state laws.

### Gift Interest

One other form that can be used in testamentary gifts is what we call the Gift Interest. There are several forms for that. One is the creation of a trust with the synagogue as the beneficiary of either all or part of the trust income. This can be a trust for a period of years or it can be a perpetual trust, especially if the beneficiaries are synagogues, schools, and hospitals. There can be a remainder interest in income from the trust. This is used quite often. By the procedure a testator creates a trust and provides that the income from this trust shall be payable to his wife, or his children, or some other person, and upon the death of that person the remainder of the income in perpetuity shall go to a synagogue. The tax relief in the gift interest testamentary

vehicles is not as great as the outright gift. But usually the tax consideration is not of primary importance in using this vehicle, because usually the testator here has a desire to take care of certain loved ones, and upon their death the balance of it is to go to a synagogue or charity.

### Insurance

Another method that can be used but is not used widely is Gifts Through Insurance. This is a form of trust in effect. Actually, a small annual contribution can guarantee a large sum at death if the beneficiary is irrevocable. The contributions are deductible against income. If the testator or the giver has a policy that has some value, the value of the policy at the time of making the irrevocable designation of the beneficiary, being the synagogue, is deductible against income as a gift.

### Annuity Gift

Another arrangement which was used sometimes on the east and west coasts, you do not hear it much in Middle America, is what we call the Annuity Gift. Special arrangements are always necessary in the annuity gift. It is a provision where either interest or an annuity payment from a large gift to a synagogue is paid to the donor during his lifetime and on the donor's death the principal goes to the synagogue.

### Straight Remainder Interest

Another method is what we call the Straight Remainder Interest. This is the vehicle by which, through the will, the testator leaves a

life estate to his wife and upon her death the remainder interest is to go to the synagogue. The remainder interest in this situation is the corpus. The entire estate goes to the synagogue. The first example on the gift interest, only the interest goes to the synagogue because the corpus is in a trust in perpetuity. This is an excellent vehicle to use where you have large income-producing properties. A person who is interested in the program of the synagogue and wishes to give, first desires to take care of his wife. He can leave his property in his will as a life estate to the wife. She has all the income from the property to help support herself. On her death the remainder interest, the entire property goes to the synagogue. It has several tax advantages which of course again are not as great as the outright gift, but it has several tax advantages. It reduces the estate taxes because the only charge to the estate of the giver or the testator is the value of this life estate to the spouse or widow. That is the only portion that is taxed in the estate. The balance of it, the remainder interest, is given to a synagogue, so it is tax free.

#### Membership in Perpetuity

A member in good standing who shall declare his intention to become a Member in Perpetuity and shall make a payment of dues to the Congregation within twelve months thereafter in such sum of not less than \$10,000.00 or such larger sum as the Board may establish, in money or its equivalent acceptable to the Board, shall become a Member in Perpetuity. A Membership in Perpetuity shall include both husband and wife. In the event of divorce, the Membership shall belong to the husband unless



the divorce decree provided otherwise; and in the event of death, the Membership does not include the subsequent spouse of the surviving spouse. Members in Perpetuity shall not be required to pay dues to the congregation during their respective lifetimes; their names shall be permanently carried on a special Roster of Members in Perpetuity which shall be established and maintained by the Congregation. Except as above set forth, a Member in Perpetuity and his surviving spouse during their lifetimes shall have all the rights, privileges, obligations and responsibilities of a member in good standing. All monies and properties paid by Members in Perpetuity as in this paragraph set forth, shall be placed in the Rabbi Raphael H. Levine Endowment Fund. A Membership in Perpetuity shall not be transferable by assignment, descent, bequest or otherwise.

#### The Two-Percent Club

The Two-percent Club is a means of obtaining maximum contributions from a number of people not matter what their particular level of affluency. The manner in which it operates is that each congregant makes a commitment to leave two-percent of their estate to the Temple. This form of bequest could have appeal to people on the basis of relating to others of their peer group.

The other advantage is that two-percent on its own sounds like a very small amount of an estate to leave to the congregation. On the other hand, it could provide a vast amount of principal from a number of different parties, again, depending on their affluence.

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GOALS AND OBJECTIVES  
(Re: Item 5 Agenda)

1. Our objectives are to insure a financially secure congregation and the preservation of the ideals of Liberal Judaism for future generations of Jews in our community.
2. To provide additional programming and services to the congregation presently not available due to lack of funds.
3. To level out an annual dues so that no further increase will be necessary.
4. To develop a repository for all gifts, bequests, as well as contributions made by members in perpetuity where the principal shall remain inviolate and the proceeds from income, interest, and dividends shall be expended in accordance with the By Laws.

Our goal is to raise \$3,000,000.00 over a maximum three-year period. This figure has been selected in order to generate the equivalent amount of half of the projected dues income. In order to fulfill the first objective, we feel this is an absolute necessity. We also feel it is realistic for the size and affluence of our congregation.

PUBLIC RELATIONS AND PROMOTIONS COMMITTEE  
(Re: Item 7 Agenda)

This committee will be organized with an eye to becoming on-going. It will not be established merely for the initial campaign but will continue to provide means and methods of properly promoting the several different programs and projects that the Board of Directors deem feasible for the congregation.

It is thought that the committee would be comprised of most of the people who are professionals and have expertise in the field of advertising, public relations, and promotion. We would also not limit participation necessarily in this group to members of the congregation, and in fact, might attempt to solicit some free help from some of the major ad agencies in the community. It is imperative that everything that is produced by way of presenting this program be done in a first-class, first-rate manner so that we present the proper image to the people we are soliciting.

We anticipate that this committee will be able to generate a beautiful, well thought out brochure for our initial campaign as well as posters, flyers, tickler cards, special letters to be addressed to the congregants and some reminders that may be put into the Temple bulletin. Additionally, they would provide ideas for proper recognition of donors and develop several different types of awards, certificates and the like.

LEGAL CONSULTANTS PANEL  
(Re: Item 8 Agenda)

We can make tremendous impact on the congregation and develop additional interest in the Endowment program by providing a much needed service to our congregants. The proposal involves getting a panel of attorneys who would agree to provide their services in developing Wills for our congregants on the basis that these congregants would make a bequest to the Temple. In turn, the attorney would have the opportunity of presenting a bill to the congregation for their services and then counter-sign the check to the congregation so that in effect, there is no money or liability on the part of the congregation, but at the same time, the attorney will have the opportunity of treating his services as a contribution for tax purposes.

The effect on the congregant should be obvious for they are getting a much needed service and will be encouraged to participate in the Bequest Program to the maximum.

PROGRAM COMMITTEE  
(Re: Item 10 Agenda)

This committee should possibly be designed with the idea of developing program ideas which would provide a service for the congregants and at the same time provide further exposure of the Endowment fund. In other words, the Rabbi Raphael H. Levine Endowment Fund would be the sponsor of such a series. The series being suggested at this time would involve estate management seminars dealing with such topics as last will and testament, trusts, highlights of our state's probate code, anatomy of an insurance policy, gifts to charity, tax shelters, social security, etc. The speakers or experts would be brought in from the community and from a number of agencies who have these people readily available, such as the Trust Departments of the banks. In addition, it would be up to the committee to come up with some other ideas that could be proposed by way of programming which would lead directly into the Endowment fund.

ORGANIZATIONAL OUTLINE  
(Re: Item 9a Agenda)

Campaign Cabinet

Overall Chairman:

Co-campaign Chairman:

Campaign Cabinet:

Captains

Major Gifts -  
Foundations -  
Medical -  
Other Pro Groups -  
Other Groups -

Division Chairmen

Membership in Perpetuity -  
Insurance -  
Accountants -  
Attorneys -  
Business -  
Furniture -  
Plumbing -  
Electrical -  
Drugs -  
General -  
Men's Wear -  
Ladies Wear -  
Physicians -  
Dentists -  
Insurance Men -  
Women -  
Singles, Co-chairmen -  
Young Leadership -

## METHOD OF ORGANIZATION AND DEVELOPMENT

Approach and Method

1. Send a letter to the entire Congregation explaining that an Endowment Fund Campaign will take place and the reasons for it. Ask for volunteers to serve on the campaign cabinet.
2. The Rabbi, Executive Director and a few key people examine the entire congregational roster and select people who would be helpful with the running of the campaign.
3. Select a campaign chairman, preferably a professional public relations person. Definite consideration should be given to hiring a professional because this is a vital area.
4. Meet with the selected individuals and the volunteers and set-up calendar for training sessions.
5. Executive Director and Rabbi will conduct minimum of 6 training sessions. Also, call on key professionals, such as attorneys specializing in tax laws, C.P.A.s, estate planners and insurance agents. They will share their knowledge and help answer questions that may surface during the solicitations.
6. A well organized effective and imaginative publicity campaign should be implemented. Publicity should consist of at least:
  - a. Special brochure
  - b. Letter to congregants
  - c. Articles in the Temple Tidings, Jewish and general newspapers
  - d. Congregational mailings informing the congregation of progress and needs.
  - e. Sermons
  - f. Announcements from the pulpit
  - g. Pictorial graphics in strategic areas in the building.
7. Have campaign chairman, cabinet and solicitors pledge.
8. Assign prospect cards to solicitors.
9. Set target dates and goals for the solicitors.
10. Set-up calendar for report meetings and discussion for the solicitors.
11. Rabbi, Executive Director, campaign chairman and key people meet on a regular basis to evaluate campaign progress and plan strategy.
12. Get key members in the affluent group to host cocktail parties in their homes and for them to invite select friends.
13. Plan a series of breakfast and luncheon meetings for peer groups and occupational groups for the congregation.



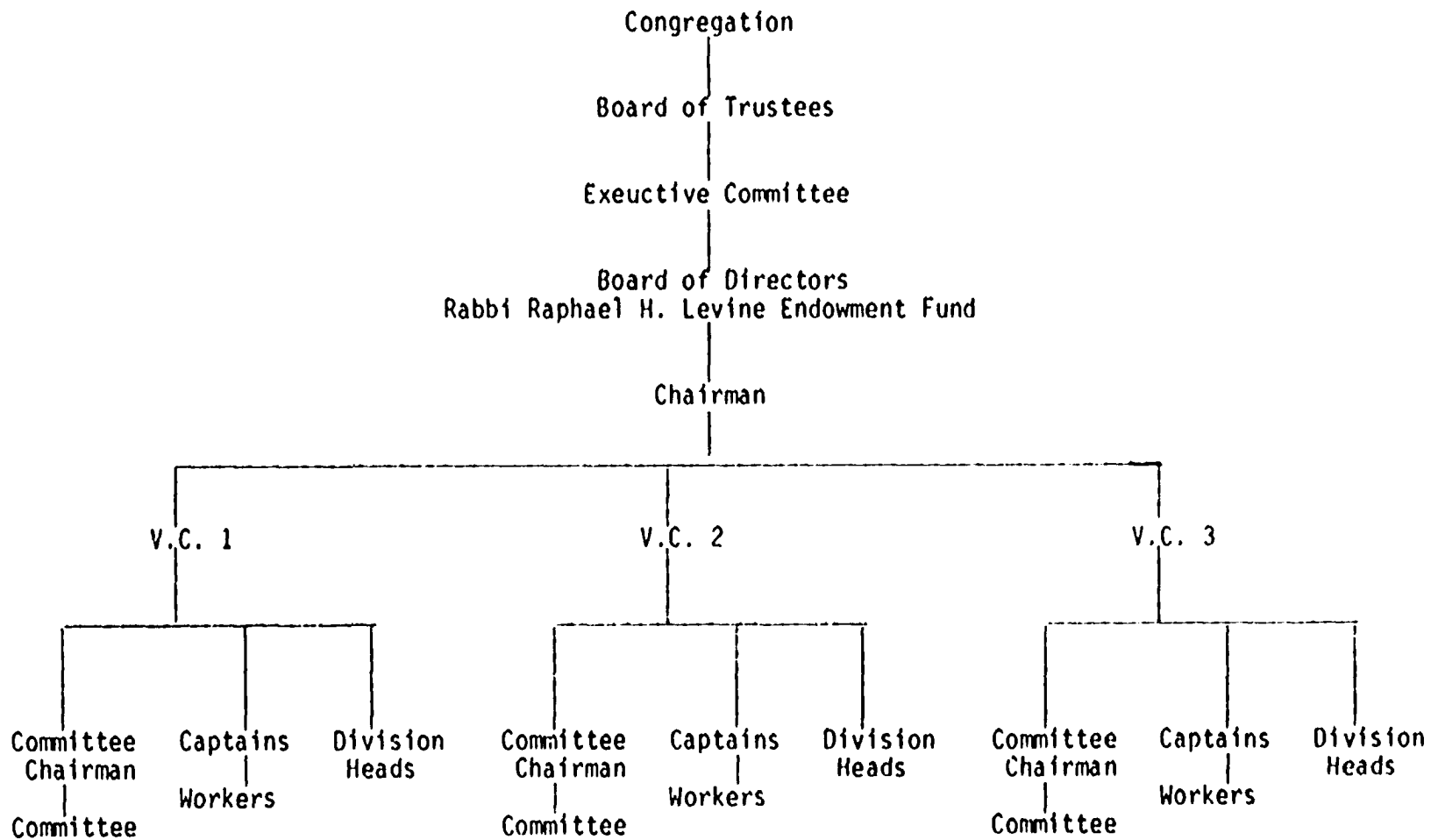
Recognition for Donors

In order to foster additional interest and enthusiasm, it will be necessary to properly recognize the donors. The following should be considered as possibilities:

1. There will be a letter of appreciation sent immediately upon receipt of the pledge.
2. Suitably embossed certificates properly framed should be presented at the annual meeting to each donor. This will include those who signed a letter of intent or pledge letter.
3. A plaque in the foyer of the sanctuary with listing of donors.
4. Listings in the Temple bulletin at regular intervals.
5. Special listings at major functions of the congregation.

ORGANIZATION CHART

RABBI RAPHAEL H. LEVINE ENDOWMENT FUND  
(Re: Item 9c Agenda)



## APPENDIX D

PROGRAM FOR THE PUBLICITY AND PROMOTIONS COMMITTEE  
OF THE RABBI RAPHAEL H. LEVINE ENDOWMENT FUND

It is accepted that this particular committee will provide the working instrument to develop this Fund, and therefore, can be assumed that we will only be as successful in our solicitation as the promotion material is effective.

Committee

It was suggested that the committee can be comprised of most of the public relations, ad agency people, and promoters, that we have as members of our congregation.

Responsibilities

1. Brochure: Develop a well thought out, attractive, impressive, and most of all, effective brochure detailing the purposes of the Fund and the means of contributing.
  - a. Short direct messages from the Senior Rabbi and the President of the congregation.
  - b. Short descriptions of the various facets of the Temple, its services and programs.
  - c. Relationship to the various taxes: Examples of cases in different tax brackets displaying the actual cost of contributions and the tax benefits derived.
  - d. Description of the awards and recognition to be accorded to the donors. Of course, there should be many pictures and the printed

word should be kept to a minimum. It should also contain a perforated sheet on which is printed the letter of intent.

- e. Tasteful and eye appealing art work.
2. Select a theme for this program as an example, "L'dor V' Dor", - From Generation unto Generation - It shall be an everlasting inheritance from thee unto thy children - No man or woman can earn greater honor than by preserving those values that should make for a better life - The future of our children and congregation are in your hands.
3. Develop the format for a letter of intent: This should contain "a menu" of all the possible ways of making donations to the Endowment Fund.
4. A follow-up letter from the Rabbi and President of the congregation urging participation requesting that solicitors be graciously received.
5. Continuous articles and blurbs in the Temple Bulletin relating to the Fund, possibly utilizing statements from participants. It was recommended that one issue of the bulletin be entirely devoted to the Fund.
6. Prepare news releases for the local Jewish Newspaper and other papers where the Fund can also be visible.
7. Prepare posters, flyers, and insert material on the Fund.

8. Up-date a specific brochure for Membership in Perpetuity.
9. Come up with a proposal for awards and proper recognition of the donors such as listing on a special plaque in the Temple foyer or individual citations.
10. Develop some throw away material to possibly be inserted in the prayer books during the High Holidays with the permission of the Rabbi and the Ritual Committee.
11. Develop a continuing display of materials in the Temple foyer relating to the Endowment Fund.

APPENDIX E  
ENDOWMENT FUND BROCHURE\*

There can be no doubt in anyone's mind that at the present rate of inflation the future of our congregation is very shaky at best. It has been written in many books by many experts that no institution of our type can survive the future unless they have a well developed, successful Endowment Program. Had an Endowment Program been put into effect 50 years ago in this congregation, we would not be concerned with the future at the present time.

GOALS AND OBJECTIVES

1. Our objectives are to insure a financially secure congregation and the preservation of the ideals of Liberal Judaism for future generations of Jews in our community.
2. To provide additional programming and services to the congregation presently not available due to insufficient funding.
3. To level out annual dues so that no further increases will be necessary.
4. To develop a repository for all gifts, bequests, as well as contributions made by members in perpetuity where the principal shall remain inviolate and the proceeds from income, interest and dividends shall be expended in accordance with the By-Laws.

Our goal is to raise \$3,000,000.00 over a maximum three-year period. This figure has been selected in order to generate the equivalent amount of half of the projected income. In order to fulfill the first objective, we feel this is an absolute necessity.

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\*I would like to acknowledge the lay people who served on the campaign board and publicity committee, with special thanks to Morton Cone, Robert Secord and Ernest Abbit, for their advice, guidance and help in developing this document.

In order to properly comprehend the WHY of this Endowment Program, we have set before you a list of projects and perspectives which we feel are absolutely essential to the future achievements, and, indeed, the very existence of our congregation.

### Fiscal

1. Each year, due to inflation, growth, and other factors, we have been forced to project a serious deficit in our operating budget. This has only been overcome through the diligent, untiring efforts of some special committees that have the thankless task of seeking additional income from the membership. It is in the interest of securing the future of this congregation that additional monies are needed so that we may, in the future, be able to present a balanced budget to the Board of Trustees and the congregation.
2. It is our interest to reach a point in our lives when it will no longer be necessary to seek dues increases, that we may maintain the annual contributions of our members at their current level and that they may enjoy the knowledge that they will never again have to provide additional support for the institution.
3. Our congregation operates on a fair-share program and there are many in our midst who are unable to contribute anything, and in many instances, a very meager amount. Nevertheless, these people enjoy the same privileges of membership as members who contribute a sizable sum, and so it should be. This then, will insure that this practice may continue into the future.
4. We look forward to the time when we may eliminate all additional

charges such as High Holiday children's tickets, instruction in seminars, life-cycle services, special programs, Memorial book, and special fund-raising programs.

### Social Services

As people of the Covenant, it is incumbent upon us to turn our moral teachings into moral acts and to make learning a prologue to action.

1. Provide sustained assistance in participation with college youth; special programming, services, and counselling - to make possible special rabbinical visits on campus.
2. Stimulate and encourage youth to consider entering the rabbinate, cantorship, or educational field and provide financial assistance where necessary.
3. Spirit of cooperation to work with Hillel in special religious services.
4. Provide a special human resources panel to assist and guide the aged, single parent, divorced, with medical, psychiatric, psychological, legal, economic, and counselling matters.
5. Develop an outreach program and satellite congregations to service the people in smaller communities throughout Washington. This will provide rabbinical service and education for the children as well as support all of the life-cycle activities.
6. Develop an active Social Action program to become equal partners in community, national, and intra-faith issues effecting the welfare of our fellow man; develop programs and projects to have greater impact and visibility.



7. Provide assistance for the indigent, transient, and troubled individuals who seek us out for help.
8. To actively aid through money and service in the re-settlement of Russian Jewish families.
9. A visitation program for the infirm, the invalid, the bedridden, the convalescent, the elderly, and the lonely.
10. A hotline for youth or adults in trouble or troubled.

#### Program

1. Development of Chavurot - bringing the Temple to the people - meeting the needs and interests of people in a small group orientation.
2. Develop a sustained lecture series - bringing some of the best minds in Judaism to the Greater Seattle Area - at least five a year.
3. Develop an ongoing celebrity series to feature the best in Jewish entertainment e.g. the Chassidic Festival.
4. Provide ongoing and continuing programs of instruction in Hebrew language on all levels - creative arts - dance - music.
5. Develop continuing services, seminars, and academies to focus on Judaic studies with top instructors from the Hebrew Union College.
6. Develop an annual scholar-in-residence program - obtaining an outstanding Jewish scholar in the world - a retreat - work with youth, congregation and clergy of the Christian world.
7. Further enhance our services with special commissions as well as presentations of outstanding and world-renown cantors and choral groups.
8. Special interest group instructions in modern dance, sculpturing,

bridge, etc. or any other expressed interests not only for acquiring a new skill, but more importantly, for the camaraderie and friendship of a fellow congregant.

9. Town hall lectures on current issues involving experts on the particular subject to make our congregation a well informed one.
10. A well developed program to further inter-faith relationships through understanding.

#### Children and Youth

1. A no fee religion school education for our young people including Hebrew language instruction and Bar/Bat Mitzvah instruction as well as all text books.
2. Seeking more professionalism in our faculty through better and more involved teacher training sessions and providing incentives for additional education.
3. An expanded and more frequent retreat or conference program for our Jr. High and High school students.
4. A camp experience every year for every young person, either at the Temple camp or other UAHC camps without fee to provide them with a living Jewish experience.
5. Scholarship fund for Israel making it possible for every graduate of our Religion School to spend five weeks in Israel in a comprehensive program that is fully subsidized.
6. The development of a much needed day care and nursery school program under the Temple's egis.
7. The future development of a full Reform Jewish Day School.

8. Greater inter-city experience for our youth with Jewish youth elsewhere.
9. A more intense and involved youth activities program to compliment and suppliment the Religion School experience.
10. Summer teen tours to great Jewish institutions throughout the country.
11. Should it be necessary, to see to it that no child or youth is denied participation in any activity for lack of funds.

#### Facilities

1. Proper maintenance and care of all our facilities and grounds. We own \$6,000,000.00 of facilities with the lowest maintence budget in the country.
2. Specifically, we have the present critical needs with the Capital Fund completely depleted:
  - a. New carpet in sanctuary, foyers, and pulpit, cost \$25,000.00
  - b. Carpeting coat room and stairweil, cost \$5,000.00
  - c. New Landscaping, replace dead plants, cost \$2,000.00
  - d. Painting program - windows, doorway, interior painting, offices, restrooms, stairwells, cost \$7,000.00
  - e. Carpeting Temple Center, cost \$5,000.00
  - f. Painting sanctuary and clean cloth walls, cost \$10,000.00
  - g. Paint and stain Suburban facilities, cost \$5,000.00
  - h. Pews for Suburban, cost \$9,000.00
  - i. Expansion of office area, cost \$60,000.00
  - j. Resurfacing parking lots, cost \$9,000.00

- k. Air condition sanctuary, cost \$30,000.00
- 3. Pay off mortgage on Suburban, cost \$110,000.00
- 4. Preserve old sanctuary, cost \$55,000.00
- 5. Improvements to new cemetery property, cost \$135,000.00
- 6. Mausoleum addition, cost \$250,000.00
- 7. New cemetery service building, cost \$50,000.00
- 8. Storage building, City Facility, cost \$8,000.00

### Inflation

We have discovered, even though every effort is made to keep expenses down, our operating budget has increased by 5.1% per year which is below the average - based on our present budget this means an additional \$33,150.00 of expenses.

Overall, our goal is to insure and strengthen the congregation to serve succeeding generations with the instruction in and fulfillment of the principles of Reform Judaism bringing contemporary relevance to our traditional beliefs and practices.

### THE HISTORY OF TEMPLE DE HIRSCH SINAI

The history of our great congregation is in and of itself the embodiment of man's constant striving and the eventual achievement of some of the loftiest goals of liberal Judaism. The centrality of the synagogue and its sustenance of Jewish life never had greater significance than it does at the present, for it stands as a beacon of light, of mercy and justice, of ethics and morality, and of concern for our fellow man in the darkness of a world plagued by confused and distorted

values. It is with deep humility, reflected pride, and the utmost of respect that we recognize our forebearers for bringing about this noble achievement. It is our obligation to see to it that their dream attains its total fulfillment and becomes a complete reality for the present and future.

THE NOBLE EXPLOITS OF OUR TIME  
ARE PASSPORTS TO ETERNITY

Temple De Hirsch Sinai - Its History and Origin

Temple De Hirsch Sinai owes its very existence to seven Jewish pioneers who had the vision, foresight, and courage to establish our congregation on May 29, 1899.

At the initial meeting, seventy Jewish families subscribed the sum of \$2,400.00 and thus our congregation came into being.

Our Religion School was initiated on Sunday, October 1, 1899 with an enrollment of sixty-five students, and in June, 1900, ten students participated in what was to be the first Confirmation. Since that time, thousands of children and youth have been confirmed and graduated at the end of their instruction in our school.

It is to the credit of this congregation that in its 79 years of history, it has been served by only four senior rabbis; Rabbi Theodore Joseph served the congregation until 1907 and was immediately followed by Rabbi Samuel Koch who served with distinction for 37 years. In 1942 Rabbi Raphael H. Levine, our present Rabbi Emeritus, became rabbi of Temple De Hirsch. During all his many years of service, he's beloved by not only this congregation but by the community as a whole.

He was succeeded by Rabbi Earl S. Starr who has served the congregation for the past nine years spearheading its efforts to obtain its present admirable record of achievement, growing from a 70 member congregation to its present 1,430 which includes 1,175 families.

From its first meeting at Morris Hall, it progressed to a location at Boylston and Marian putting in the basement level. However, this was not large enough and so they moved to the corner of East Union where the old sanctuary still proudly stands as a monument to their efforts.

In 1924 the Temple Center, housing offices, library, classrooms, and the social hall were added. This was joined by a new Religion School building at the corner of East Pike and 15th Avenue in the year 1951. As the congregation grew, so did its needs, and in November, 1960, our magnificent new sanctuary was dedicated.

A momentous occasion was the merger of Temple De Hirsch and Temple Sinai in January, 1971. Thus, our facilities were expanded to include two beautiful buildings in an ideal setting in Bellevue,

Our beautiful Chapel Building, a gift from the Schoenfeld Gardner Foundation came into being in 1974 and the lower floor was the result of a generous gift from the Samuel Stroum's.

To complete the life-cycle needs, the congregation has two facilities, one located on Queen Anne of 6½ acres, and an additional 6½ acres next to the Floral Hill Cemetery in Lynnwood.

Our impact on the community has been widespread and of everlasting quality. The many adult education programs which have been presented for the benefit of all bring the outstanding personalities to the

Northwest for the edification and entertainment of the entire community.

To translate our moral teachings into moral action, the Temple has always stood in the forefront of many of the social issues dedicated to the betterment of mankind and the fulfillment of our Covenant. Today, we stand in the forefront of the Reform movement and provide exemplary leadership for the entire Jewish community.

RABBI RAPHAEL H. LEVINE ENDOWMENT FUND  
THIS ENDOWMENT IS LOVINGLY DEDICATED IN TRIBUTE

Rabbi Raphael Levine; teacher, scholar, humanitarian, author, artist, will undoubtedly go down in the annals of history as one of the most outstanding men of our time. He served this Temple with dignity, compassion, sensitivity, heart, and a deep commitment for over 36 years.

A graduate of the Hebrew Union College, he came to us from England where he served until his synagogue was destroyed in the "Blitz". Among his attributes, he is also a dreamer and his dreams have given birth to many an outstanding program. His dream for brotherhood and love for mankind brought about the program "Challenge" which was televised for some 15 years, and the development of Camp Brotherhood - rising out of a 320 acre farm is a great ecumenical religious, educational, and cultural center.

His interest and love for the young brought to fruition the development of the camp now known as Camp Swig, which was started in 1947.

He has authored several books. Amongst them, "Holy Mountain", "Israel - a Frank Appraisal", "Legacy of the Hebrew Prophets".

Rabbi Levine also has the distinction of being the founder and

honorary president of the Pacific Association of Reform Rabbis. He has served on the Boards of just about every major community service organization. He has also been an appointee to many governmental committees and commissions.

He is the recipient of many awards including B'nai B'rith's "Man of the Year".

Rabbi Levine's story is a courageous and gallant one inspired by his love for Judaism so that no challenge has ever been too great for him. A most exceptional man, the most outstanding quality about him, is his compassion and love for his fellow man backed by his deeds and a most outstanding career. He has earned a niche in our history that will live forever.

In gratitude and in humble tribute, we dedicate this Endowment Fund. Your dollars will help make his dreams come true.

GIFTS ARE LIVING PRAYERS INSCRIBED IN THE HOUSE OF GOD...  
THE HOUSE OF GOD IS THE KEY TO JEWISH SURVIVAL

Our sanctuaries are merely stones, bricks, mortar and wood, but nevertheless, they house the very soul and heart of Judaism for it contains the best of our heritage and traditions and the indomitable spirit of the Jewish people.

Generations of pioneers that have gone before have made possible all that we enjoy today in this our congregation. It is now our responsibility to carry on in that tradition of excellence and with our good fortunes make possible the perpetuation and fulfillment of the dreams of those dedicated pioneers who gave us the benefit of their foresight, courage, dedication, and means so that we might enjoy our great spiritual



heritage and fulfill our Covenant in our never ceasing strivings to help improve the world in which we live. It is now our responsibility to assure that the purposes for which our predecessors struggled incessantly will be sustained.

In the pages that follow, you will find suggestions as to how one may contribute to this fund. There is no better way for those of us who have been blessed with good fortune to demonstrate our appreciation and gratitude for all that we have. A gift to the Endowment Fund will keep on giving forever and in so doing will perpetuate the name of the donor. You will treasure the pride that will well up in your heart in the knowledge that your gift is helping preserve a synagogue that you personally will use for years, and your children, and your grandchildren after you.

## PROPOSED OPTIONS, PROGRAMS, AND METHODS OF ENDOWMENT

Short Term Income Trust

There are several other methods I would like to mention in lifetime gifts or contributions. One of the major tax procedures that can be used and which is not used is the Short Term Income Trust. If we have a congregant who has for some reason over a period of two or three or four years an unusual influx of income, income that will go out in a high tax rate, this taxpayer can set up a short term (2 year minimum) trust where the income from the properties is put into the trust. It can be payable to a charity or to the synagogue. It is non-taxable in his report. It goes fully to his charity or to his synagogue.

Standard Trust

The other method that the lifetime giver can use is the Standard Trust with the synagogue as the beneficiary either for all the income or any portion of the income. The giver sets up a permanent trust and transfers certain properties and the income from the trust which is administered usually by a trust company or a bank but sometimes by individuals. The income from it is paid to a beneficiary and if he designates a synagogue or charity, of course, it is beneficial.

Testamentary Gifts

A second category is the Testamentary Gift. In testamentary gifts, again, it can be just a designation in the will of an outright sum of money or property. In our federal estate taxes, any gifts set

out in the will are not subject to the estate or death taxes. It reduces the total tax problem or tax liability of the estate. There can be times when the estate is high enough that the net loss of the estate is a very small percentage. For example, in a high bracket estate a \$10,000 gift may cost the heirs, because they would be the ones who would probably retain it if a gift to the synagogue was not made, anywhere from \$2,000 up to \$9,000 depending on the rate. But there can be a tax saving even to the heirs in the will.

Each state has similar exemptions or credits in the estate or death tax rate for gifts to charities and synagogues. They have usually some limitations. For example, New York has a limitation where I believe only 15%, if there is a widow or children, can go to one charity. Some states have no qualifications. You should check on your own state laws.

#### Gift Interest

One other form that can be used in testamentary gifts is what we call the Gift Interest. There are several forms for that. One is the creation of a trust with the synagogue as the beneficiary of either all or part of the trust income. This can be a trust for a period of years or it can be a perpetual trust, especially if the beneficiaries are synagogues, schools, and hospitals. There can be a remainder interest in income from the trust. This is used quite often. By the procedure a testator creates a trust and provides that the income from this trust shall be payable to his wife, or his children, or some other person, and upon the death of that person the remainder of the income in perpetuity shall go to a synagogue. The tax relief in the gift interest testamentary

vehicles is not as great as the outright gift. But usually the tax consideration is not of primary importance in using this vehicle, because usually the testator here has a desire to take care of certain loved ones, and upon their death the balance of it is to go to a synagogue or charity.

### Insurance

Another method that can be used but is not used widely is Gifts Through Insurance. This is a form of trust in effect. Actually, a small annual contribution can guarantee a large sum at death if the beneficiary is irrevocable. The contributions are deductible against income. If the testator or the giver has a policy that has some value, the value of the policy at the time of making the irrevocable designation of the beneficiary, being the synagogue, is deductible against income as a gift.

### Annuity Gift

Another arrangement which was used sometimes on the east and west coasts, you do not hear it much in Middle America, is what we call the Annuity Gift. Special arrangements are always necessary in the annuity gift. It is a provision where either interest or an annuity payment from a large gift to a synagogue is paid to the donor during his lifetime and on the donor's death the principal goes to the synagogue.

### Straight Remainder Interest

Another method is what we call the Straight Remainder Interest. This is the vehicle by which, through the will, the testator leaves a

life estate to his wife and upon her death the remainder interest is to go to the synagogue. The remainder interest in this situation is the corpus. The entire estate goes to the synagogue. The first example on the gift interest, only the interest goes to the synagogue because the corpus is in a trust in perpetuity. This is an excellent vehicle to use where you have large income-producing properties. A person who is interested in the program of the synagogue and wishes to give, first desires to take care of his wife. He can leave his property in his will as a life estate to the wife. She has all the income from the property to help support herself. On her death the remainder interest, the entire property goes to the synagogue. It has several tax advantages which of course again are not as great as the outright gift, but it has several tax advantages. It reduces the estate taxes because the only charge to the estate of the giver or the testator is the value of this life estate to the spouse or widow. That is the only portion that is taxed in the estate. The balance of it, the remainder interest, is given to a synagogue, so it is tax free.

#### Membership in Perpetuity

A member in good standing who shall declare his intention to become a Member in Perpetuity and shall make a payment of dues to the Congregation within twelve months thereafter in such sum of not less than \$10,000.00 or such larger sum as the Board may establish, in money or its equivalent acceptable to the Board, shall become a Member in Perpetuity. A Membership in Perpetuity shall include both husband and wife. In the event of divorce, the Membership shall belong to the husband unless

the divorce decree provided otherwise; and in the event of death, the Membership does not include the subsequent spouse of the surviving spouse. Members in Perpetuity shall not be required to pay dues to the congregation during their respective lifetimes; their names shall be permanently carried on a special Roster of Members in Perpetuity which shall be established and maintained by the Congregation. Except as above set forth, a Member in Perpetuity and his surviving spouse during their lifetimes shall have all the rights, privileges, obligations and responsibilities of a member in good standing. All monies and properties paid by Members in Perpetuity as in this paragraph set forth, shall be placed in the Rabbi Raphael H. Levine Endowment Fund. A Membership in Perpetuity shall not be transferable by assignment, descent, bequest or otherwise.

#### The Two-Percent Club

The Two-percent Club is a means of obtaining maximum contributions from a number of people not matter what their particular level of affluency. The manner in which it operates is that each congregant makes a commitment to leave two-percent of their estate to the Temple. This form of bequest could have appeal to people on the basis of relating to others of their peer group.

The other advantage is that two-percent on its own sounds like a very small amount of an estate to leave to the congregation. On the other hand, it could provide a vast amount of principal from a number of different parties, again, depending on their affluence.

## PLEDGE LETTER

In order to help insure the preservation of our congregation,  
I hereby pledge my intention to contribute to the Rabbi Raphael H.  
Levine Endowment Fund of Temple De Hirsch Sinai in the following manner:

- ( ) I have already made provisions.....  
 ( ) I pledge..... check appropriate phrase

- ( ) to make Temple De Hirsch Sinai the beneficiary of a life insurance policy in the amount of \$\_\_\_\_\_.
- ( ) to give to Temple De Hirsch Sinai a gift of real estate, securities, in the approximate amount of \$\_\_\_\_\_.
- ( ) to include in my will a bequest in the amount of \$\_\_\_\_\_.
- ( ) to establish a trust with Temple De Hirsch Sinai as a beneficiary in the amount of \$\_\_\_\_\_.

- ( ) I would like to have a member of the Endowment Fund Committee contact me for further information regarding the form and amount of my intended gift.

Date\_\_\_\_\_Signature\_\_\_\_\_

### ACKNOWLEDGEMENT AND RECOGNITION OF DONORS

All of the donors who generously contribute to the Rabbi Raphael H. Levine Endowment Fund will be properly acknowledged and their gift perpetuated through a listing of names on a suitable plaque which is to be placed in our Temple foyer.

In addition, those who become Members in Perpetuity, shall also be listed. This then, assures that not only will your contribution keep on giving to the support of the Temple, but your name shall be perpetuated as well.

Each donor shall also receive a suitably inscribed certificate for display in his/her office or home.

Donations shall also receive recognition in the Temple bulletin as they occur. Remember, too, if it is your wish, that you may have a loved one memorialized through a donation to this fund.

### FACILITIES AND OBJECTS FOR MEMORIALS AND HONORIALS

The following items are available for the prescribed donation in order to honor the living or memorialize our loved ones who have passed away.

|                         |              |
|-------------------------|--------------|
| Suburban Sanctuary      | \$250,000.00 |
| Suburban School Bldg.   | 175,000.00   |
| Mausoleum Addition      | 300,000.00   |
| Temple Auditorium       | 150,000.00   |
| Temple Annex            | 75,000.00    |
| Rabbi's Study           | 10,000.00    |
| Assistant Rabbi's Study | 7,000.00     |



|                             |                         |
|-----------------------------|-------------------------|
| Religion School Office      | \$ 6,000.00             |
| Executive Director's Office | 6,000.00                |
| General Offices             | 8,000.00                |
| Classrooms                  | 5,000.00                |
| Torah Scrolls               | 5,000.00                |
| Torah Ornaments             | 2,500.00                |
| Torah Crown                 | 2,000.00 to \$10,000.00 |
| Stained Glass Windows       | 2,500.00 ea.            |
| Stained Glass Windows (set) | 6,000.00                |

## APPENDIX F

## PROGRAM COMMITTEE

This committee should possibly be designed with the idea of developing program ideas which would provide a service for the congregants and at the same time provide further exposure of the Endowment fund. In other words, the Rabbi Raphael H. Levine Endowment Fund would be the sponsor of such a series. The series being suggested at this time would involve estate management seminars dealing with such topics as last will and testament, trusts, highlights of our state's probate code, anatomy of an insurance policy, gifts to charity, tax shelters, social security, etc. The speakers or experts would be brought in from the community and from a number of agencies who have these people readily available, such as the Trust Departments of the banks. In addition, it would be up to the committee to come up with some other ideas that could be proposed by way of programming which would lead directly into the Endowment fund.

## APPENDIX G

### ORGANIZATIONAL OUTLINE

#### Campaign Cabinet

Overall Chairman:

Co-campaign Chairman:

Campaign Cabinet:

#### Captains

Major Gifts -  
 Foundations -  
 Medical -  
 Other Pro Groups -  
 Other Groups -

#### Division Chairmen

Membership in Perpetuity -  
 Insurance -  
 Accountants -  
 Attorneys -  
 Business -  
 Furniture -  
 Plumbing -  
 Electrical -  
 Drugs -  
 General -  
 Men's Wear -  
 Ladies Wear -  
 Physicians -  
 Dentists -  
 Insurance Men -  
 Women -  
 Singles, Co-chairmen -  
 Young Leadership -

## APPENDIX H

## METHODS OF GIVING

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Facilities and Objects for Memorials and Honorials

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|                             |                         |
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| Suburban School Bldg.       | 175,000.00              |
| Mausoleum Addition          | 300,000.00              |
| Temple Auditorium           | 150,000.00              |
| Temple Annex                | 75,000.00               |
| Rabbi's Study               | 10,000.00               |
| Assistant Rabbi's Study     | 7,000.00                |
| Religion School Office      | 6,000.00                |
| Executive Director's Office | 6,000.00                |
| General Offices             | 8,000.00                |
| Classrooms                  | 5,000.00                |
| Torah Scrolls               | 5,000.00                |
| Torah Ornaments             | 2,500.00                |
| Torah Crown                 | 2,000.00 to \$10,000.00 |
| Torah Covers                | 2,000.00                |
| Stained Glass Windows       | 2,500.00 ea.            |
| Stained Glass Windows (set) | 6,000.00                |

## PLEDGE LETTER

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I hereby pledge my intention to contribute to the Rabbi Raphael H.  
Levine Endowment Fund of Temple De Hirsch Sinai in the following manner:

- ( ) I have already made provisions.....  
 ( ) I pledge..... check appropriate phrase

( ) to make Temple De Hirsch Sinai the beneficiary of a life in-  
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( ) to give to Temple De Hirsch Sinai a gift of real estate, secur-  
ities, in the approximate amount of \$\_\_\_\_\_.

( ) to include in my will a bequest in the amount of \$\_\_\_\_\_.

( ) to establish a trust with Temple De Hirsch Sinai as a beneficiary  
in the amount of \$\_\_\_\_\_.

- ( ) I would like to have a member of the Endowment Fund Committee con-  
tact me for further information regarding the form and amount of  
my intended gift.

Date \_\_\_\_\_ Signature \_\_\_\_\_

## APPENDIX I

## SAMPLE EVALUATION FORMS

## EVALUATION FORM FOR SOLICITERS

Rate each item on a scale from 1 to 5. 1 equals poor - 5 equals excellent. Do not use half numbers, e.g. (1½).

|                                   |   |   |   |   |   |
|-----------------------------------|---|---|---|---|---|
| A. ORGANIZATION                   | 1 | 2 | 3 | 4 | 5 |
| B. COMMUNICATION                  | 1 | 2 | 3 | 4 | 5 |
| C. REALISTIC GOAL                 | 1 | 2 | 3 | 4 | 5 |
| D. PROMOTION AND PUBLICITY        | 1 | 2 | 3 | 4 | 5 |
| E. BROCHURE                       | 1 | 2 | 3 | 4 | 5 |
| F. TRAINING SESSIONS              | 1 | 2 | 3 | 4 | 5 |
| G. PROSPECT CARDS                 | 1 | 2 | 3 | 4 | 5 |
| H. PLEDGE CARDS                   | 1 | 2 | 3 | 4 | 5 |
| I. ORIENTATION SESSIONS           | 1 | 2 | 3 | 4 | 5 |
| J. PROSPECT RESEARCH              | 1 | 2 | 3 | 4 | 5 |
| K. GETTING APPOINTMENTS           | 1 | 2 | 3 | 4 | 5 |
| L. SOLICITATION AND EFFECTIVENESS | 1 | 2 | 3 | 4 | 5 |
| M. RECEPTION                      | 1 | 2 | 3 | 4 | 5 |
| N. SUCCESS FACTOR                 | 1 | 2 | 3 | 4 | 5 |

COMMENTS:

## EVALUATION FORM FOR BOARD OF DIRECTORS

Rate each item on a scale from 1 to 5. 1 equals poor - 5 equals excellent. Do not use half numbers, e.g. (1½).

|                       |   |   |   |   |   |
|-----------------------|---|---|---|---|---|
| A. ATTAINMENT OF GOAL | 1 | 2 | 3 | 4 | 5 |
| B. STRUCTURE          | 1 | 2 | 3 | 4 | 5 |
| C. ORGANIZATION       | 1 | 2 | 3 | 4 | 5 |
| D. INVOLVEMENT        | 1 | 2 | 3 | 4 | 5 |
| E. PUBLIC RELATIONS   | 1 | 2 | 3 | 4 | 5 |
| F. PROMOTION          | 1 | 2 | 3 | 4 | 5 |

COMMENTS:

## EVALUATION FORM FOR CAMPAIGN CHAIRMAN AND DIVISION HEADS

Rate each item on a scale from 1 to 5. 1 equals poor - 5 equals excellent. Do not use half numbers, e.g. (1½).

|                      |   |   |   |   |   |
|----------------------|---|---|---|---|---|
| A. ORGANIZATION      | 1 | 2 | 3 | 4 | 5 |
| B. COMMUNICATION     | 1 | 2 | 3 | 4 | 5 |
| C. PUBLICITY         | 1 | 2 | 3 | 4 | 5 |
| D. BROCHURE          | 1 | 2 | 3 | 4 | 5 |
| E. RATING            | 1 | 2 | 3 | 4 | 5 |
| F. SOLICITATION      | 1 | 2 | 3 | 4 | 5 |
| G. TRAINING SESSIONS | 1 | 2 | 3 | 4 | 5 |
| H. SUCCESS FACTOR    | 1 | 2 | 3 | 4 | 5 |
| I. PROSPECT RESEARCH | 1 | 2 | 3 | 4 | 5 |
| J. TIME FACTOR       | 1 | 2 | 3 | 4 | 5 |

COMMENTS:

## EVALUATION FORM FOR THE SOLICITED

Rate each item on a scale from 1 to 5. 1 equals poor - 5 equals excellent. Do not use half numbers, e.g. (1½).

|                            |   |   |   |   |   |
|----------------------------|---|---|---|---|---|
| A. PURPOSES OF FUND        | 1 | 2 | 3 | 4 | 5 |
| B. ORIENTATION             | 1 | 2 | 3 | 4 | 5 |
| C. PROMOTION AND PUBLICITY | 1 | 2 | 3 | 4 | 5 |
| D. BROCHURE                | 1 | 2 | 3 | 4 | 5 |
| E. COMPETENCE OF SOLICITOR | 1 | 2 | 3 | 4 | 5 |
| F. ATTITUDE OF SOLICITOR   | 1 | 2 | 3 | 4 | 5 |
| G. GOODWILL ESTABLISHED    | 1 | 2 | 3 | 4 | 5 |
| H. FOLLOW-UP               | 1 | 2 | 3 | 4 | 5 |
| I. RECOGNITION OF DONORS   | 1 | 2 | 3 | 4 | 5 |

COMMENTS:

## APPENDIX J

## SAMPLE MATRIX

Campaign Chairman and Division Heads

| Solicitors        | Organiza-<br>tion   | Communi-<br>cation | Brochure | Rating | Training<br>Sessions | Success<br>Factor |
|-------------------|---------------------|--------------------|----------|--------|----------------------|-------------------|
|                   | Organiza-<br>tion   |                    |          |        |                      |                   |
|                   | Communi-<br>cation  |                    |          |        |                      |                   |
|                   | Brochure            |                    |          |        |                      |                   |
|                   | Rating              |                    |          |        |                      |                   |
|                   | Training<br>Session |                    |          |        |                      |                   |
| Success<br>Factor |                     |                    |          |        |                      |                   |

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